ST. JOSEPH DOWNTOWN VISION

Downtown Vision and Master Plan

Existing Conditions Analysis

May 20, 2019

HOUSEAL LAVIGNE ASSOCIATES

EXISTING CONDITIONS ANALYSIS

The following analysis looks at the existing conditions, influencing factors, trends, future potentials, issues, and opportunities within Downtown St. Joseph and the surrounding areas. The analysis is the culmination of community outreach, field reconnaissance, research, review of data provided by the City, and analysis conducted by the consultant, containing the following three items:

- Issues and Opportunities Report
- Demographic and Market Analysis
- Parking Evaluation Progress Update

The Existing Conditions Analysis highlights issues that should be addressed in the Downtown Master Plan and will be taken into consideration during the development of the goals, objectives, and planning recommendations.

HOUSEAL LAVIGNE ASSOCIATES

MEMORANDUM

TO: City of St. Joseph
Kristen Gundersen, Community Development Director
Downtown Plan Steering Committee

FROM: Houseal Lavigne Associates
John Houseal, FAICP, Principal

DATE: Friday, March 1, 2019

RE: Downtown Vision and Master Plan
Issues & Opportunities Report

The purpose of this memorandum is to provide a preliminary analysis and discussion of initial community outreach and existing conditions within Downtown St. Joseph and adjacent areas. This analysis was informed by public engagement at workshops; online outreach tools including questionnaires and an interactive mapping tool; a review of data, regulations, studies, and past plans as provided by City staff; field reconnaissance conducted in January 2019; and additional research.

This memorandum includes a preliminary summary of community outreach conducted to date, followed by analysis of existing conditions related to specific planning components within Downtown. Together, these are intended to provide an early understanding of issues and opportunities facing Downtown St. Joseph.

The intent of this material is to serve as a basis for discussion with City staff and Downtown Plan Steering Committee (DPSC). These materials are preliminary and do not contain any plan recommendations. The issues and opportunities identified in this report are intended to serve as a foundation for the planning process which will guide the development of the Downtown Master Plan to come.

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Preliminary Community Outreach Summary

Engaging the St. Joseph community is essential to creating a great plan for Downtown. Outreach helps to gather valuable input that will guide the direction of the planning process and ensure the Master Plan is reflective of the needs and desires of residents and those who shop, dine, visit, and experience Downtown. Understanding the importance of public engagement, outreach has been placed at the core of the master planning process. This features both in-person events and online tools designed to facilitate discussion and collect feedback from a diverse group of voices, including residents, the business community, property owners, City staff, local officials, and a variety of other stakeholders. This input will have a direct impact on the recommendations and policies of the Downtown Master Plan.

Outreach Completed

The following outreach events and online engagement tools have been utilized thus far to receive feedback from the St. Joseph community. Online engagement will remain open until development of a draft Master Plan begins, and additional in-person events will be held later in the process.

Lakeland & Whirlpool Survey (Thursday, May 10 to Tuesday, May 29, 2018)

Led by the Downtown Plan Steering Committee, the City of St. Joseph conducted a survey to gather initial input regarding Downtown. Completed by 261 participants, the survey asked residents for their thoughts on how to make Downtown St. Joseph more inviting and what changes they would like to see.

Steering Committee Workshop (Wednesday, October 3, 2018)

This workshop, held with members of the Downtown Plan Steering Committee, marked the initiation of both the planning process as well as community outreach efforts.

Community Workshop (Tuesday, November 13, 2018)

Attended by 50 individuals, this workshop was the first opportunity for residents and community stakeholders to offer their input regarding Downtown St. Joseph. The workshop included a review of the planning process and an exercise designed to gather feedback on issues, opportunity, priority projects, and assets for the Downtown area.

Downtown Business & Property Owners Workshop (Wednesday, November 14, 2018)

Attended by 35 individuals, this workshop was held to engage the business community, with a focus on discussing issues and opportunities in Downtown as relates to owning property and operating a business.

Project Website

To support the planning process, a project website was developed that acts as the primary resource for information regarding the Master Plan. This includes project updates, meeting notices, and project documents. In addition, the website provides access to online engagement tools, including questionnaires and map.social. These applications are intended to supplement in-person events by offering more accessible methods for individuals to provide feedback in their own time. The website will remain active throughout the planning process.

Online Questionnaires

Three online questionnaires were developed: one for residents, one for business owners and operators, and one for youth and students. These are intended to gather more detailed information and supplement in-person events. Thus far, the online questionnaires have received 150 responses and will remain open until drafting of the Master Plan document begins.

map.social

map.social is an online outreach tool that allows participants to create a map of their community and provide feedback that is spatially tied to a specific location in Downtown St. Joseph. Using map.social individuals were able to identify community assets, development priority sites, problematic intersections, public safety concerns, undesirable uses, desired developments, and site that are poor in appearance. map.social will remain open until drafting of the Master Plan document begins.

Preliminary Key Findings (for DPSC discussion purposes)

The following is a summary of key findings from outreach completed thus far in the planning process. This represents a synthesis of feedback received from all engagement opportunities completed, including workshops, online surveys, and map.social. While a wide variety of issues and opportunities were discussed, the following represent the major themes and important topics identified through outreach that must be addressed by the Downtown Vision Master Plan.

It is important to note that the content within this summary does not represent recommendations of the Downtown Master Plan or City policy, but is intended to characterize the input received from those who participated in the outreach process.

Parking

Overall, parking was regularly identified as the top issue facing Downtown St. Joseph, with a wide range of different and occasionally contradictory opinions voiced. For example, some participants indicated that Downtown lacks sufficient parking, while others argued that Downtown has adequate parking but it is difficult to find or located too far from desired destinations. The location, availability, duration, and turnover of parking was regularly discussed, with business owners noting that many spots are used by employees or beach-goers limiting parking for customers and downtown visitors. While many residents identified the amount of free parking as an asset, some argued that introducing fees could help manage how parking is utilized and provide a source of revenue for other projects in the Downtown.

Ultimately, residents and business owners alike agreed that parking within Downtown needs to be addressed comprehensively. Some proposed consolidation of parking, improvements to better mark time limits, stricter enforcement of regulations, construction of a parking garage, and other projects to better organize parking and make it easier to find and use.

Connectivity & Mobility

The movement of cars, pedestrians, and cyclists within Downtown was a critical concern during public engagement. Participants indicated that existing traffic patterns can be confusing and difficult to navigate, particularly due to one-ways and high-traffic roadways like Main Street. The change of Lake Street to a one-way by Silver Beach during the summer months was regularly discussed as an issue to traffic flow. On a larger scale, the increase in traffic and greater number of drivers unfamiliar with traffic patterns during the summer was highlighted as a challenge to mobility for both residents and tourists. However, the intent to improve traffic flow was supported, with many arguing that permanent changes to increase connectivity and mobility are essential. Some participants noted that though charming, the brick roads are a nuisance to drive on and many are in poor condition. Additionally, many stated the need to fix existing potholes.

Alternative Modes of Transportation

Many participants hoped to see an increase in bicycle infrastructure, including bike racks and paved paths that would connect to the beach and neighboring communities. Participants indicated they are forced to drive to Downtown despite their wish to bike due to the lack of infrastructure and safety. Others mentioned the need for a shuttle service or trolley to the beach and Downtown, which would offset parking demands along with biking. Participants also call for improvements to pedestrian safety within Downtown, as well as extensions of trails that lead to Downtown from outlying residential areas.

Connecting Across Main Street

Closely related to connectivity and mobility, public engagement demonstrated a strong desire to better connect downtown across Main Street. This roadway was emphasized as a barrier to pedestrian and cyclist mobility given its width, the speed of cars, and high traffic volume. Main Street was often discussed as a boundary that separates the commercial focus of State Street from civic, educational, and related office uses to the east. The street is also under Michigan Department of

Transportation (MDOT) jurisdiction, which makes changing or improving the roadway more difficult. When considering the potential for growth in Downtown, residents indicated that the area east of Main Street should be a focus, and that efforts to improve connectivity across Main Street will support that growth. Potential projects included landscaped medians, better timing of pedestrian signals, pedestrian refuge islands, and the other improvements that will make cyclists and pedestrians feel safe crossing the roadway.

Connecting Down the Bluff

Another important connection that residents hoped to see is greater flow between the Downtown core and the lakefront, specifically ways to improve movement 'down the bluff.' Participants voiced that the existing stairs and ramps on the bluff are not conducive to mobility between the two areas and can be unsafe. Further, Business owners indicated that the route to the beach has a visual 'distance' that discourages beach-goers from patronizing Downtown. As such, a more clear physical and visual connection between the two areas is desired, including improvements to the bluff itself as well as investment between these two destinations.

Business Diversity

Many of the businesses within Downtown St. Joseph cater to seasonal tourism and visitors during the summer months. Prominent examples include souvenir and gift stores, art stores and galleries, and wine tasting cafes. As a result, members of the business community indicated that the study area lacks business diversity and can suffer from low activity during the non-summer months. In particular, some businesses are closed during the summer months, while others may not have goods and services that appeal to residents or non-summer visitors. Residents were in agreement and called for additional stores, shops, and restaurants that offer greater diversity of goods, services, experiences, and food. The need for later shop hours was also frequently mentioned.

Attracting Youth

Participants highlighted the lack of youth-oriented businesses that appeal to teenagers, students, and even young professionals. Residents mentioned that Downtown lacks the activity and excitement to attract youth, and that there are no public or private spaces in the area that appeal to younger residents. As a part of business diversity, emphasis was placed on encouraging uses and activities that appeal to youth. In addition, participants indicated that these demographics should be considered as part of public improvements.

Dining & Recreation

Many participants wished for greater variety in dining options and food trucks within the Downtown area, particularly healthier, vegan options. Others hoped to see more festivals such as a "Taste of St. Joseph/Benton Harbor" or ethnic festivals. Residents also indicated the need for additional places for children to play and exercise while parents socialize, particularly in during the winter. A new restaurant and bar by Silver Beach was mentioned as an idea, along with public restrooms and a dog-friendly beach.

Underutilized Properties

Downtown St. Joseph does not suffer from a high volume of vacant lots; however, residents indicated that the visibility and impact of certain vacant or underutilized properties detracts from the character of the study area. This included the vacant property at Pleasant Street and Lake Boulevard (previously YWCA), public parking lots, and developments with extensive parking, which were seen as prime real estate that could be better activated. Participants emphasized the potential for redevelopment and investment on these properties as a way to bring new uses, activities, and excitement into Downtown.

Boat Access

Despite being a lakefront community, participants noted that lack of access between the waterways surrounding Downtown and the Downtown itself. There are no public boat ties or slips near Downtown, and the City's marina is located on the other side of the St. Joseph River, with no easy access or transit to Downtown. Residents and business owners argued that providing ways for boaters to access Downtown will capture more activity and bring new consumers into the study area. Proposed projects included public boat ties, docks, or slips south of the St. Joseph river that would allow short-term boat parking.

Activation of the Riverfront

Building upon the desire for greater boat access, residents also hoped to see better activation of the riverfront. Currently, the St. Joseph river runs north of the Downtown study area, bordered by the Margaret B. Upton Arboretum, the Berrien County Courthouse, and additional private uses. Residents voiced that the bluff and existing uses, particularly the courthouse and multi-family developments along the river, disconnect the riverfront from Downtown. Further, participants indicated that the riverfront could be better activated with open space, recreational amenities, public spaces, boat access, and a continuous trail connecting from Downtown to the beach.

Character of Downtown

The overall character and appearance of Downtown was regularly discussed across outreach events. While the character of State Street and a few specific buildings was well regarded, many residents stated that Downtown can appear dated or lacking in vibrancy. Generally, this concern was directed more towards private buildings and connected to poor maintenance of buildings and infrastructure within the area, particularly the alleys. In addition, while the appearance of State Street is well addressed and maintained, other areas have not been the focus of the same improvements and are in need of façade enhancements. Some participants indicated that a new and consistent aesthetic is needed for Downtown that will established a unified image for the area. Some residents indicated that Main Street's appearance is impacted by zoning as well as vacant first floor uses.

Preliminary Existing Conditions Analysis

The following is a preliminary review and analysis of existing conditions within the Downtown study area. This was informed by community outreach, field reconnaissance, and additional research and analysis. Each section represents a major planning component that will be address within the Downtown Master Plan

Existing Land Use

Land use and how individual properties are developed and utilized is foundational to planning. Existing land use impacts the nature of development and dictates why individuals visit Downtown and how they spend their time there. For the study area, having the correct balance of uses will be essential to maintaining Downtown's exciting and inviting character while leveraging opportunities for development.

Overall, Downtown St. Joseph has a healthy and appropriate mix of uses, including a variety of commercial developments, public / semi-public facilities, and different residential products. While a few smaller properties are incompatible with adjacent uses, the majority are consistent with the nature and character of development in the Downtown.

All parcels within the Downtown study area have been categorized into one of the following 17 land use designations:

- **Single-Family Detached** – consists of residential properties that contain a single, detached housing unit.
- **Mixed Residential** – consists of residential properties that are either multifamily dwellings, such as apartment buildings, or single-family attached dwellings, such as rowhomes
- **Commercial Retail** – consists of businesses that sell goods, including gas stations.
- **Commercial Service** – consists of businesses that offer services, such as salons, boat rentals, and banks.
- **Restaurant** – consists of establishments that offer dining options including restaurants, cafes, and bars.
- **Mixed Commercial** – consists of properties that include a mix of retail, service, and restaurant commercial uses.
- **Hotel** – consists of establishments that provide overnight accommodations.
- **Mixed Use** – consists of properties with differing uses on the first floor and upper floor, usually commercial at ground level and office or residential above.
- **Entertainment & Cultural** – consists of recreation, cultural, and artistic facilities that support tourism and entertainment within Downtown.
- **Office** – consists of office buildings for professional businesses and firms, as well as single-family homes that have been converted into offices.

- **Industrial** – consists of properties and structures dedicated to industrial businesses and operations.
- **Public/Semi-Public** – consists of public services and amenities that support quality of life within the community, including government buildings, community facilities, schools, and places of worship.
- **Marina** – consists of land along the waterfront dedicated to water access or harbors with moorings.
- **Parks & Open Space** – consists of properties that support active and passive recreation such as parks, preserved open spaces, and the bluff.
- **Railroad** – consists of land dedicated to railroad tracks and train stations.
- **Parking** – consists of properties used for public or private surface parking lots.
- **Vacant** – consists of properties that are undeveloped and have no existing structure.

Figure 1

Existing Land Use (By Parcel)

- Single-Family Detached
- Mixed Residential
- Commercial Retail
- Commercial Service
- Mixed Commercial
- Restaurant
- Hotel
- Mixed Use
- Entertainment & Culture
- Office
- Industrial
- Public/Semi-Public
- Marina
- Parks & Open Space
- Railroad
- Parking
- Vacant

Figure 2
Existing Land Use (By Building)

- Single-Family Detached
- Mixed Residential
- Commercial Retail
- Commercial Service
- Mixed Commercial
- Restaurant
- Hotel
- Mixed Use
- Entertainment & Culture
- Office
- Industrial
- Public/Semi-Public

Figure 3

Existing Ground Floor Use (By Building)

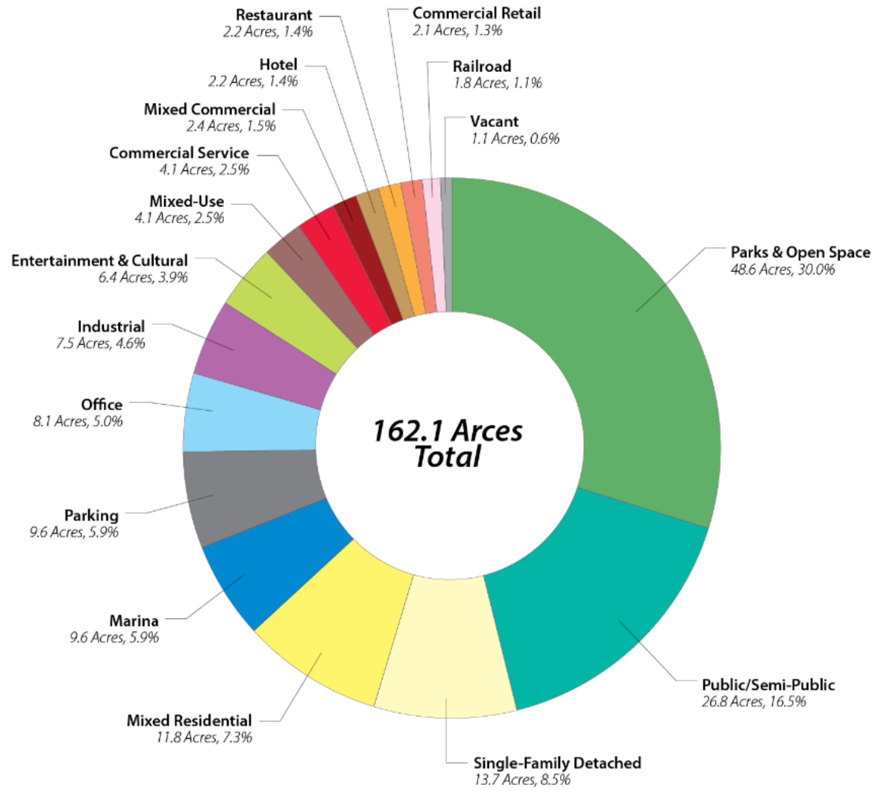
- Single-Family Detached
- Mixed Residential
- Commercial Retail
- Commercial Service
- Mixed Commercial
- Restaurant
- Hotel
- Entertainment & Culture
- Office
- Industrial
- Public/Semi-Public

Figure 4

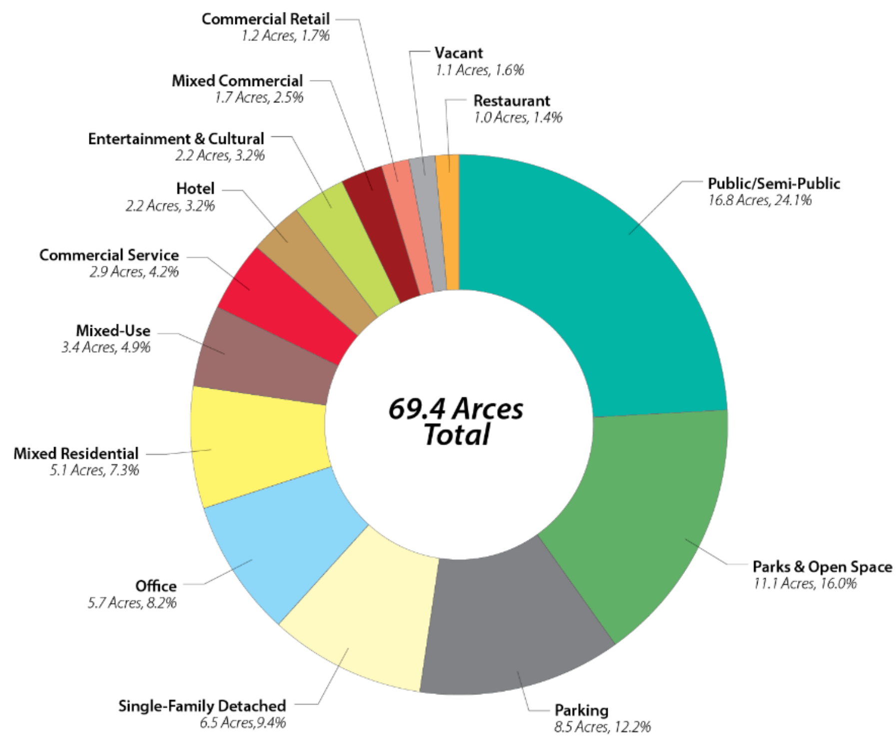
Existing Upper Floor Use (By Building)

- Single-Family Detached
- Mixed Residential
- Commercial Retail
- Commercial Service
- Mixed Commercial
- Restaurant
- Hotel
- Entertainment & Culture
- Office
- Industrial
- Public/Semi-Public
- No Upper Floor

Existing Land Use Distribution
(Total Study Area)



Existing Land Use Distribution
(Downtown Core)



Based upon an analysis of existing land use, the following observations were made:

- Within the total study area, including secondary study areas, parks account for the greatest acreage, comprising 30 percent, roughly 48.6 acres. This is followed by public/semi-public uses with 16.5 percent. Beyond these two designations, no other land use accounts for more than 9 percent of the study area. This indicates a healthy mix of uses, with 53.5 percent of the study area split between 15 different uses.
- Within the Downtown core study area only, public/semi-public uses make up the majority of land uses, at 24.1 percent or 16.8 acres. This correlates with the high number of civic buildings within the core area. Parks and open space account for the second most area at 16.0 percent or 11.1 acres. Parking takes up 12.2 percent or 8.5 acres, which is a significant amount for a higher-density downtown setting. Commercial retail, commercial service, mixed commercial, and mixed-use combined only makes up 13.3 percent of the area, or 9.2 acres, which is considerably low for a central commercial district. Additionally, restaurants account for only 1.4 percent or 1.1 acres of the Downtown core.
- A small group of industrial uses are located along Broad Street, east of the Downtown core. This impacts the character of Downtown’s eastern approach as well as the riverfront and is incompatible with adjacent residential districts.
- Mixed-use properties are primarily located along State Street. While only accounting for 3.4 percent of the primary study area, these properties are prominently located and have a strong impact on the character of the area.
- The ground floor uses of mixed-use properties are primarily commercial in nature, while upper floors are exclusively multi-family residential or office space.
- The Downtown area is largely built-out, with only 1.1 acres of vacant land within the total study area.
- As most of the area is already built out, ways to develop more efficiently, such as better utilizing parking parcels, will be essential to future growth.
- A few lower-density residential properties are located within the Downtown core which are inconsistent with the uses and built form of surrounding properties.

Current Zoning

Zoning within St. Joseph is established by Section 33 of the City's Code of Ordinances, which defines how land can be used and establishes standards for development. The Downtown study area contains nine of the City's 15 zoning districts, as follows:

Code	District Name	Intended Use	Maximum Building Height (Feet)
R1	Single-Family Detached Residence	Establish and preserve single-family neighborhoods free from other uses. (*Note: the R-1 district includes five sub-districts, R1-A, R1-B, R1-C, R1-D, and R1-E, that vary in certain dimensional regulations.*	35
R2	Two-Family Residence	Create a diverse residential environment by allowing medium density residential development.	35
R3	Multiple Family Residence	All for multiple family structures and apartment-type dwellings with central services.	60
C	Commercial Business	Serve the general needs of the community within a large variety of retail commercial, financial, professional, office, service, and other general commercial activities.	35
CO-A / CO-B	Commercial Office	Promote orderly development of land for commercial, office, administrative, and institutional uses in areas of low traffic volume.	35 (CO-A) 80 (CO-B)
D	Downtown	Establish and preserve the downtown area as a commercial and retail center.	50 by right, 80 as conditional
I1	Light Industrial	Accommodate wholesale and warehouse uses, as well as industrial operations that do not negatively affect surrounding districts	50
OS	Open Space	Retain and conserve the open character of certain waterfronts, ravines, and scenic overlooks.	35
W	Water Recreation	Encourage recreational uses that are compatible with the City's lakefront and riverfront areas.	50

The following observations were made for zoning in the study area and Downtown approaches:

- The majority of the Downtown core is split between the Downtown (D) and Commercial Office (CO-B) zoning districts. Including the approaches, other districts that account for a large amount of properties includes Single Family Detached Residence (R1-E), Commercial Business (C), and Water Recreation (W)

- The Commercial Office (CO-B) district does not permit most retail and service uses, limiting these kinds of developments east of Main Street.
- While the Downtown (D) District is listed as allowing building of 80 feet in height, this is conditional, with only 50 feet allowed by right. As a result, the Commercial Office (CO-B) district allows the tallest structures by right.
- The eastern and western approaches to Downtown include properties zoned Water Recreation (W), with the eastern approach also containing some larger Light Industrial (I1) zones.
- Six planned unit developments have been established, all located within the approaches to Downtown but none in the Downtown Core.

Figure 5

Current Zoning

- Single Family Detached Residence (R1-E)
- Two-Family Residence (R2)
- Multiple Family Residence (R3)
- Commercial Business (C)
- Commercial Office (CO-A)
- Commercial Office (CO-B)
- Downtown (D)
- Light Industrial (I1)
- Open Space (OS)
- Water Recreation (W)
- Planned Unit Development
  - 3 *Lighthouse Point Condominiums*
  - 4 *Waterfront Marina Condominiums*
  - 5 *Lake Street*
  - 8 *Riverwalk*
  - 16 *Star Condominiums*
  - 20 *The Golf Club at Harbor Shores*

Built Form

Built form has a significant impact on the character and identity of Downtown St. Joseph, impacting how individuals move within and interact with the area around them. Particularly in urban areas, the built form can significantly contribute to vitality and create an inviting, pedestrian-oriented district. This includes the density, location, height, and mass of structures in the area, which has a particular impact on the appearance of Downtown. Understanding Downtown's built form will guide recommendations for future investment, informing the desired scale, density, and general style of development.

Figure Ground

A figure ground map depicts the building footprints for all structures within the Downtown. This is intended to provide a visual understanding of the density of structures within the area and their relation to one another. To better define the built form of Downtown St. Joseph, figure ground maps have been developed for both the ground floor and second floor of all structures. Based upon this analysis, the following observations were made:

- Urban areas along State Street have large clusters of small buildings, with significant gaps on adjacent streets.
- East of Main Street, larger individual buildings are surrounded by significant gaps, generally the result of parking lots.
- South of Elm Street, stand-alone medium to small structures are closely placed, creating a more even distribution of development.

In a fully-developed urban area, a figure ground map will generally mimic the shape and pattern of the street grid, with rights-of-way clearly defined. However, buildings in the Downtown study area seem irregularly disperse and appear to lack any formal pattern. The general shape of the State Street, Main Street, and Pleasant Street corridors can be seen, but the prominence of vacant properties disrupts the pattern of development.

In addition, structures of two or more stories are generally favorable in urban areas, creating a preferred mass and scale of development. The visible differences between the second floor and ground floor figure ground maps shows the regularity of single-story buildings in Downtown. These can detract from the built form and appearance of Downtown as an active urban core.

Ground Floor Figure Ground

Upper Floor Figure Ground

Figure 6
Figure Ground

Building Height

As discussed, successful downtowns are generally composed of buildings two or more stories in height, resulting in a comfortable and pedestrian-friendly environment. While Downtown St. Joseph does have a few buildings exceeding 10 stories in height, the location and prominence of single-story buildings detracts from the character of the area. An analysis of existing building heights will ensure future investment complements existing structures while contributing to a preferred height and mass for the Downtown. Based upon an analysis of building height, the following observations were made:

- Most buildings within the downtown are one or two stories high, signifying a smaller scale environment.
- A few buildings located along the northern edge of Downtown are significantly taller than the rest of the study area. This includes the 15-story Lakeview Terrace and the 11-story Whitcomb Retirement Community. Other taller buildings include the Silver Beach Hotel and the Boulevard Inn & Bistro.
- The multifamily developments along St. Joseph River obstruct the view of both the river and Lake Michigan, even when viewing from above the bluff.
- Single-story structures along State Street and Main Street detract from the mass and visual impact of these corridors as the community’s urban core.

Figure 7

Building Height by Floor

- 1 Floor
- 2-3 Floors
- 4-5 Floors
- 6-9 Floors
- 10+ Floors
- No Building

Streetwall

The term 'streetwall' is used to describe a continuous row of structures built at the front of the property at or near the sidewalk, with no setbacks and no or minimal sideyards. As a result, these structures create a continuous 'wall' of buildings. Streetwalls provide an urban environment that is comfortable and desirable for pedestrians due to the sense of enclosure. The closeness of buildings encourages pedestrian activity, provides easy access between adjacent uses, slows automobile traffic, and emphasizes the pedestrian over the automobile in a way that improves safety. Maintaining a complete streetwall is a valuable component of creating an active, vibrant, and pedestrian-oriented Downtown.

In Downtown St. Joseph, State Street is a great example of a streetwall, with a continuous wall of buildings placed at the front of the property extending from Elm Street to Ship Street. However, the study area in general has an inconsistent streetwall, with numerous gaps and some blocks that have no structures built to the front of the property. Prominent examples include:

- Lake Boulevard, which has only a few structures located at the front of the property and is largely lined with parking lots.
- The Silver Beach Hotel, which is almost entirely setback from the property's edge, except for one portion.
- The block bounded by Main Street, Ship Street, Court Street, and Port Street, which almost entirely set back from the property's edge.
- The south side of Elm Street, which has three parking lots with no streetwall. This creates a harsh edge in comparison to the continuous streetwall north of Elm Street.
- Both Berrien County Courthouse parking lots along Port Street, which result in entire blocks with no streetwall.
- Setback properties on Port, Ship, and Broad Streets.

The study area also includes residential blocks where the urban streetwall is replaced by residential setbacks. These create a uniform distance between the road and individual homes, resulting in a consistent and unified appearance. Residential setbacks are generally located southwest of Market Street, however, some mixing between urban streetwalls and residential setbacks is found within the study area.

Figure 8
Street Walls & Setbacks

Urban Street Wall
Residential Setback

Public & Private Parking

Parking was identified through community outreach as the most important issues facing Downtown St. Joseph. While the following analysis provides a foundation for understanding this concern, greater focus will be given to parking Downtown through a dedicated analysis to be conducted later in the process.

An inventory of parking within the study indicates that Downtown has a high volume of parking, including both public and private parking and on-street parking options. Understanding the availability and distribution of parking in the Downtown will be essential to establishing a comprehensive approach to parking needs within the Master Plan. The following observations were based on field reconnaissance and research; however, more detailed analysis of parking demand and capacities will be completed as part of the planning process.

- 9.6 acres, roughly 5.9 percent, of the total study area is dedicated to public and private surface parking lots. Private parking is distributed evenly throughout, while public parking is concentrated in the Downtown core and along Broad Street.
- Public lots provide a large volume of parking, with many lots offering free, all-day parking.
- On-street parking is primarily located within the Downtown core, regulated as two-hour year-round, with some areas limited to two-hour Memorial Day to Labor Day. There is a cluster of all-day on-street parking by the bluff on Port Street and Lake Boulevard.
- Many parking lots line Lake Boulevard, taking up prime real estate with waterfront views. Opportunities to consolidate parking and redevelop these lots should be examined as part of the Master Plan.
- Much of the parking within the study area is not clearly signed, leading to confusion towards time regulations**.** An example is the public parking lot on Broad and Main Street that is half all day parking and half two-hour parking. Signage does not clearly identify this time differentiation.
- The majority of parking in the Downtown lacks sufficient screening, diminishing the aesthetic of the area. The Silver Beach Hotel parking and the Berrien County Courthouse parking on Port and Main Street are examples of lots that would highly benefit from landscaping and screening.
- Many parking lots, both public and private, are located on prime real estate and have high visibility, particularly along Main Street. This can detract from the character of Downtown and limit development potential on properties that would have the greatest impact on the appearance of the area.

Figure 9

Public & Private Parking

- All Day Parking
- Two-Hour Parking
- Two-Hour: Memorial Day to Labor Day
- 15-Minute Parking
- Public Pay to Park
- Private Parking

One-Way & Two-Way Streets

Circulation in the Downtown is provided by a combination of one- and two- way streets, supported by alleys for site-specific access, service vehicles, and infrastructure. Overall, the direction and placement of one-way streets within Downtown St. Joseph results in a few configurations that can be confusing to drivers and cause longer travel times. This is emphasized by the City's seasonal tourism, as many drivers unfamiliar with travel configurations pass from the community each summer. Reviewing the configuration of one- and two-way streets and alleys in Downtown, the following observations were made:

- Alleys in the downtown core between Ship and Elm Street are limited to one-way, which can help prevent traffic jams particularly with cars entering and leaving parking lots.
- Beyond Elm Street where the neighborhood becomes more residential, alleys become two-way to allow for more flexibility.
- In the downtown core, streets are all two-way except for State Street between Elm and Ship Street. This was the result of streetscaping improvements that decreased the wide of the travel lane to increase sidewalks and provide angled parking.
- East of Main Street has numerous one-way streets, largely dictated by the separation of Ship and Port Streets moving to and from the Wayne Street bridge, all of which are under the jurisdiction of MDOT. Coupled with the resulting one-way side streets, moving within this area can be complicated and confusing.
- A driver heading south on Wayne Street between Port Street and Ship Street can only turn left at the intersection of Ship Street due to one-ways. This forces the driver to have to cross over the bridge into Benton Harbor and make a U-turn to head back in the right direction southward.
- During the winter months, the direction and flow of traffic along Lake Street is altered to accommodate additional traffic related to tourism. During outreach, participants noted that this is confusing for residents and tourists alike, and called for an improved and permanent flow of traffic.

Figure 10

One-Way & Two-Way Streets

Two-Way Street
One-Way Street
Seasonal One-Way Street
Two-Way Alley
One-Way Alley

Community Facilities & Parks

Downtown St. Joseph contains a large concentration of community facilities and parks, including government buildings, cultural uses, places of worship, and a school. These uses contribute to the character and vitality of Downtown and emphasize the areas role as the core of the community. However, community facilities and parks can also reduce the potential for investment by blocking development on specific properties. Further, some of these uses are managed by outside organizations, thus addressing specific issues will require coordination with partner groups. An analysis of community facilities and parks within Downtown yielded the following observations:

- While Downtown has a significant acreage of parks and open space, the location, accessibility, and activation of these areas can limit their use. For example, while open space exists along the St. Joseph Riverfront, it is not well connected or activated to attract foot traffic. Similarly, the position of the Whirlpool Compass Fountain at the bottom of the bluff limits its use as a community gathering space.
- East of Main Street acts as a small governmental campus, including the Berrien County Courthouse, the Berrien County Sheriff's Department, the St. Joseph Fire Station, the U.S. Post Office, and St. Joseph City Hall. These are supported by many related law offices and financial institutions in the area.
- The volume of public and semi-public uses in Downtown decreases the amount of tax-generating parcels, particularly where entire blocks are inhabited by non tax-paying organizations.
- A significant portion of the St. Joseph Riverfront is contained within the properties of the Berrien County Courthouse and Berrien County Sheriff's Department, as well as the Margaret B. Upton Arboretum. This could help support greater activation of the riverfront, but will require close cooperation with the county.
- The only educational facility within the Downtown study area is Lake Michigan Catholic School; however, the Trinity Lutheran School's campus is located adjacent to the study area just east of Main Street between Market Street and Pearl Street. These facilities present a unique set of needs that must be considered when addressing larger issues in the area.
- Entertainment and cultural uses located throughout Downtown help to provide activities within the area that draw residents and visitors to the community. Facilities like the Krasl Art Center and the Silver Beach Carousel are invaluable resources, particularly for a community of St. Joseph's size.

Figure 11

Community Facilities

Government
- 6 Berrien County Courthouse
- 7 Berrien County Sheriff's Department
- 8 Post Office
- 12 Fire Station
- 13 City Hall
- 18 St Joseph City Library
- 20 Berrien County Administration Building

Cultural
- 2 Silver Beach Carousel & Curious Kids Museum Discovery Zone
- 11 Box Factory for the Arts
- 14 Curious Kids' Museum
- 16 Heritage Museum & Culture Center
- 19 Krasl Art Center

Education
- 10 Lake Michigan Catholic School

Park
- 1 Silver Beach County Park
- 3 Whirlpool Centenial Park
- 4 Lake Bluff Park
- 5 Margaret B. Upton Arboretum
- 22 Lions Park
- 23 Kiwanis Park
- 24 Point Park

Place of Worship
- 9 St. Joseph Catholic Church
- 15 Saron Lutheran Church
- 17 Trinity Lutheran Church

Preliminary Development Opportunity Sites

To guide future investment within Downtown St. Joseph, Development Opportunity Sites have been identified for both the study area and approaches to Downtown. While all properties within the Downtown are potential candidates for redevelopment, these sites represent properties that are most well positioned for development and reinvestment, and could have a substantial impact on the character and vitality of Downtown. Again, these sites are preliminary and intended to initiate a discussion regarding redevelopment within the Downtown.

Development Opportunity Sites are categorized as follows:

- Primary Sites – These properties will have the largest impact and yield the greatest benefit to Downtown St. Joseph, and thus should be prioritized for investment. These properties have high visibility and are generally ready or easily available for development.
- Secondary Sites – These properties are not as well positioned for redevelopment or will have a less dramatic impact on the Downtown. While investment should be encouraged, these sites will likely be considered less of a development priority and opportunity for Downtown.

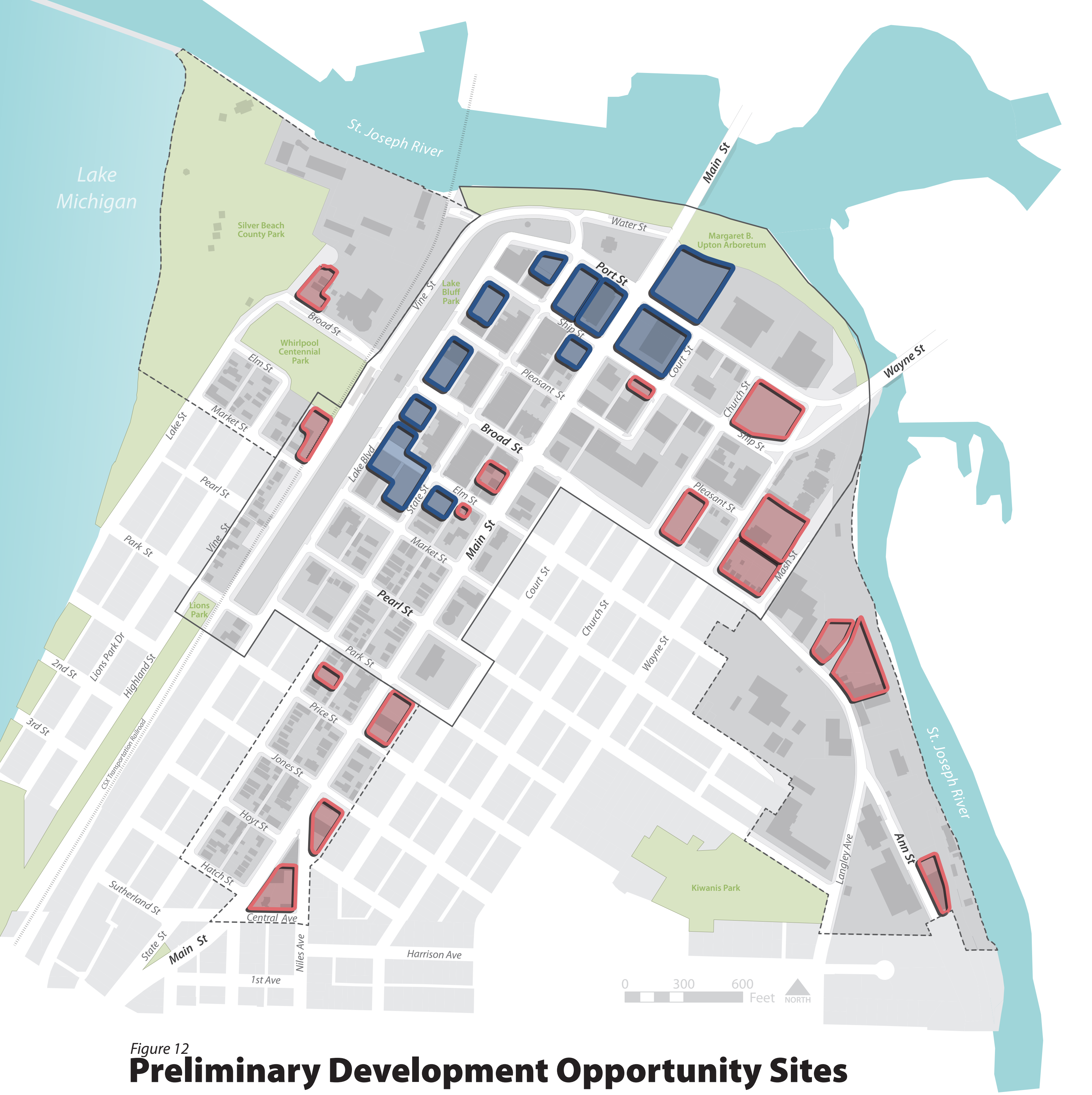


Figure 12

Preliminary Development Opportunity Sites

- Primary Sites
- Secondary Sites

MEMORANDUM

TO:	City of St. Joseph Kristen Gundersen, Community Development Director Downtown Plan Steering Committee
FROM:	Houseal Lavigne Associates John Houseal, FAICP, Principal
DATE:	Friday, March 1, 2019
RE:	Downtown Vision and Master Plan Demographic & Market Analysis

The purpose of this memorandum is to provide an analysis of important demographic and market factors which will inform the planning process. The analysis examines trends relevant to the City of St. Joseph as a whole and Downtown specifically. Where applicable, St. Joseph has been compared to neighboring Benton Harbor and Berrien County. This analysis provides a foundation for developing market viable plan recommendations for the Downtown Vision and Master Plan. Moving forward, more detailed analysis will be conducted to provide context on Downtown St. Joseph's competitive position within the surrounding region.

This memorandum is divided into four subsections: 1) Demographics, 2) Labor & Employment, 3) Housing, and 4) Retail Gap Analysis. Data for these analyses were obtained from the U.S. Census Bureau and ESRI Business Analyst.

Demographics

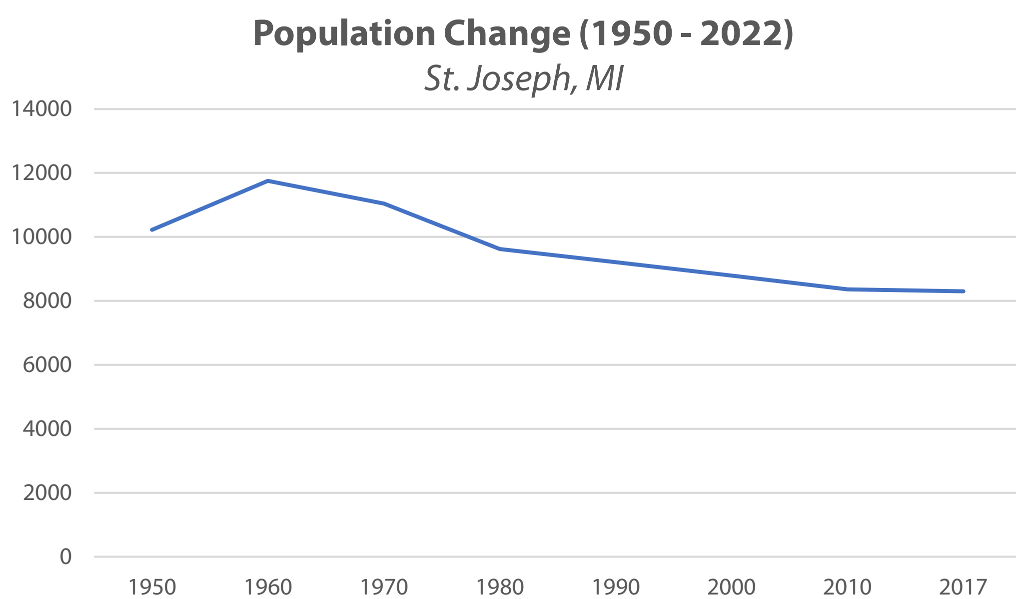
Population

In 2017, the City of St. Joseph had an estimated population of 8,301 residents, representing a decrease of less than 1 percent from the 2010 population of 8,365 residents. Though the population has fallen by almost 3,500 from highs in the 1960s, the City's population is relatively stable and likely to remain consistent over the near term.

Population trends within St. Joseph are consistent with those in both Benton Harbor and Berrien County at large. Both have stable populations having experienced a modest decline over the past decade.

An estimated 9,300 individuals live within a 5-minute drive of Downtown St. Joseph, with an additional 40,700 individual in a 10-minute drive. This is based upon a spatial analysis, and thus includes residents of St. Joseph as well as neighboring communities and townships.

NOTE: Growth in tourism in vacation destination communities like St. Joseph can impact population counts due to the presence of second residences, vacation homes, and part-time residents who spend most of the year in another community. These individuals are not included within the census estimated population of a community. With a stable total population, a growing share of unreported seasonal residents would translate to a smaller year-round population overall. As further discussed throughout this memorandum, St. Joseph's position as a vacation community has numerous impacts on demographic trends.



Source: U.S. Census Bureau, Houseal Laviane

Demographic Summary (2000-2017)

	2000	2010	2017	2000-2017 Difference	2000-2017 CAGR*
St. Joseph, MI					
Population	**8,789**	**8,365**	**8,301**	**-488**	**-0.3%**
Households	4,117	3,933	4,176	+59	**+0.1%**
Families	2,057	1,941	1,949	-108	**-0.3%**
Average Household Size	1.99	1.97	1.89	-0.1	**-0.3%**
Median Age	39.3	41.6	41.6	+2.3	**+0.3%**
Benton Harbor, MI					
Population	**11,182**	**10,038**	**9,944**	**-1,238**	**-0.7%**
Households	3,767	3,548	4,043	+276	**+0.4%**
Families	2,559	2,335	2,389	-170	**-0.4%**
Average Household Size	2.91	2.77	2.43	-0.5	**-1.1%**
Median Age	25.40	28.30	32.00	+6.6	**+1.4%**
Berrien County, MI					
Population	**162,453**	**156,813**	**154,948**	**-7,505**	**-0.3%**
Households	63,569	63,054	63,035	-534	**-0.0%**
Families	43,336	41,585	40,621	-2,715	**-0.4%**
Average Household Size	2.49	2.43	2.38	-0.1	**-0.3%**
Median Age	37.40	41.00	42.00	+4.6	**+0.7%**

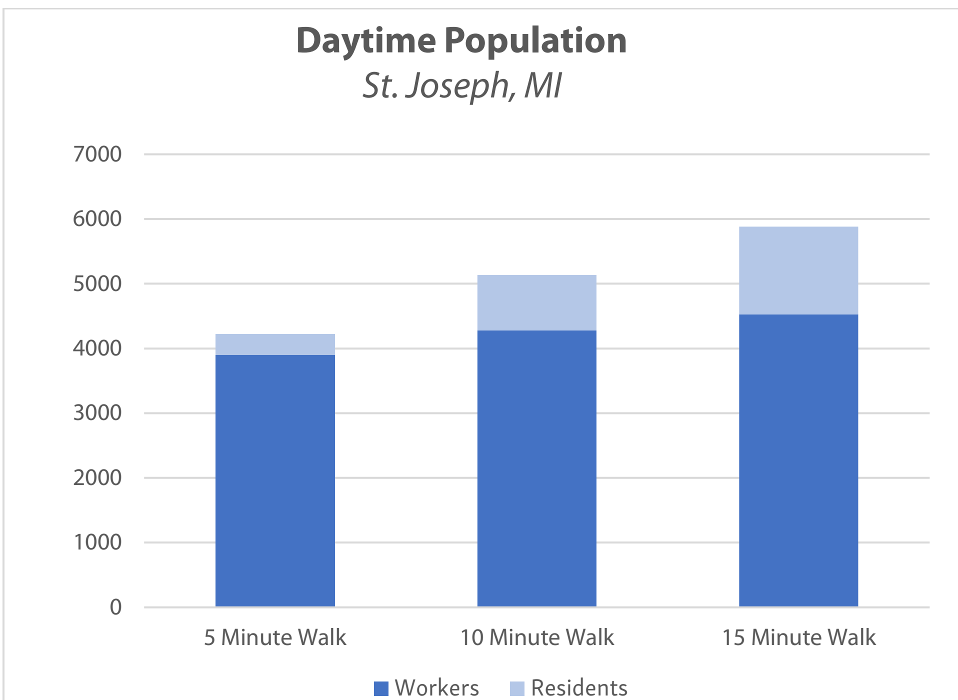
*Compound Annual Growth Rate

Daytime Population

The daytime population for Downtown St. Joseph was calculated using 5-, 10-, and 15-minute walk times from the intersection of Main and Broad Streets. The daytime population within a 15-minute walk of Downtown St. Joseph is 5,883 individuals, comprising 1,357 residents and 4,526 individuals employed in the area. With such a large component of employees making up the total daytime population, there is significant potential to capture expenditures from area workers. Berrien County and law offices in particular are a significant source of employees in and proximate to Downtown.

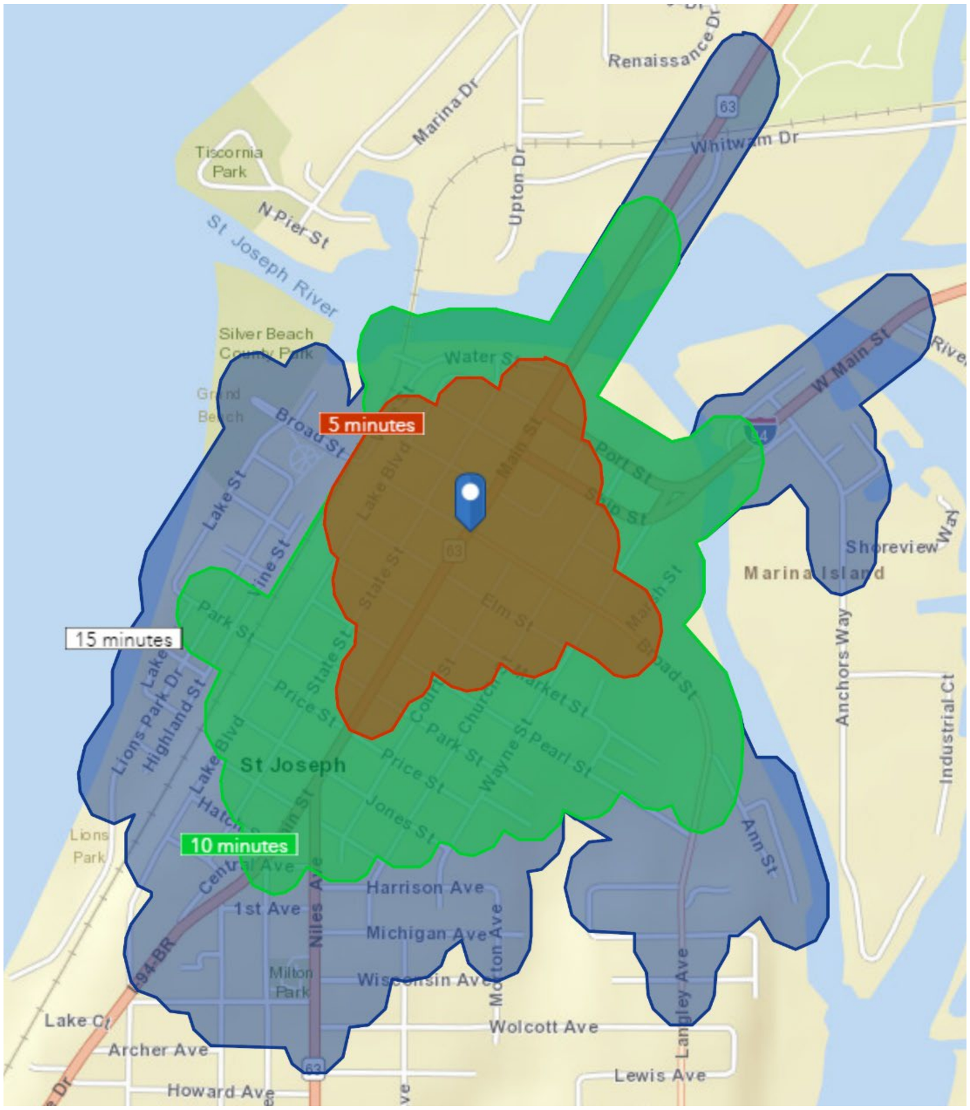
It should be noted; however, that the 15-minute walk time is less likely to capture pedestrian traffic than daytime populations in the 10- and particularly 5-minute walk times. Individuals within a 15-minutes walk are more likely to drive to Downtown, but still indicate the potential to attract consumers within the immediate area.

Conversely, only 321 individuals live within a 5-minute walk, representing less than 8 percent of the daytime population. Efforts to increase daytime resident population would increase pedestrian activity and support for local businesses, particularly personal services and retailers serving daily needs within the Downtown.



Source: ESRI Business Analyst, U.S. Census Bureau

Daytime Population Walk Times Map



Population Age

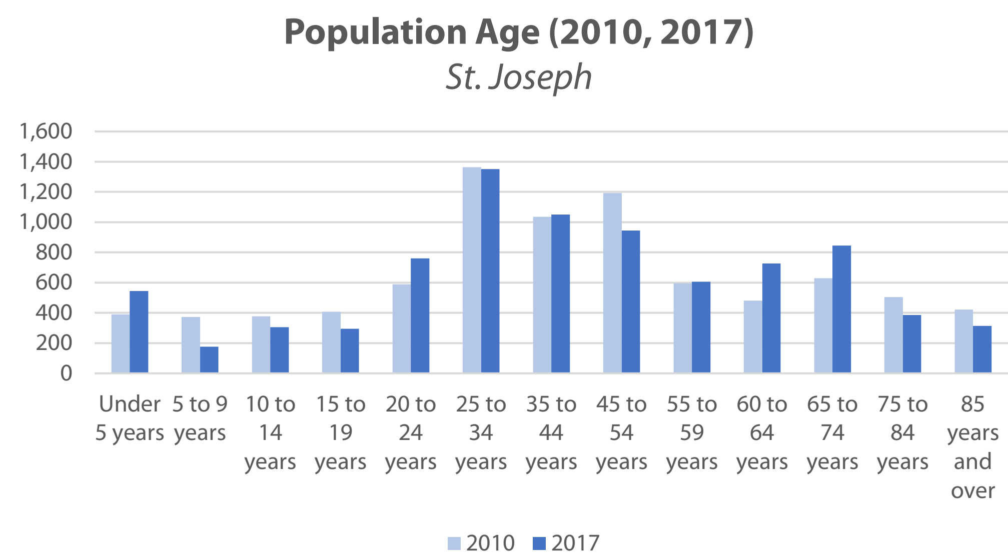
St. Joseph's population is aging at a modest rate. The median age increased from 39.3 to 41.6 between 2000 and 2010, and remained steady for the past 7 years, still estimated at 41.6 in 2017. The 55+ population was the largest age cohort in 2017, accounting for 34.6 percent of the community, followed by those 20-34) at 25.4 percent. Both of these age cohorts saw growth between 2010 and 2017, while the segment of the population 0-19 and 35-54 years experienced a decline.

Overall, St. Joseph's age distribution is not consistent with Berrien County. While St. Joseph's older age cohorts account for a greater percentage of the total population, the County's older cohorts are growing at a faster rate. Additionally, St. Joseph has a larger percentage of 20 to 34 year olds (25.4 percent in the City compared to 17.5

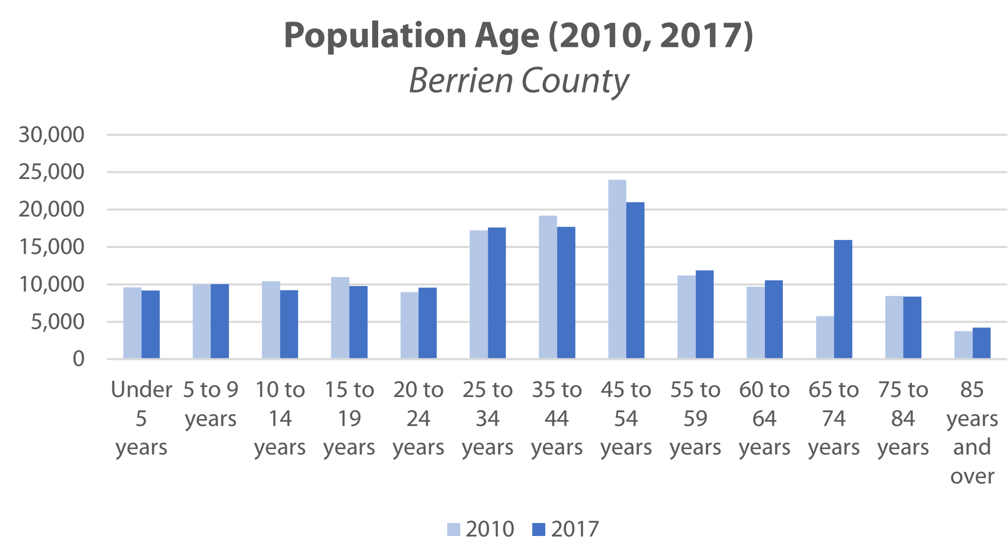
percent in the County) and a smaller percentage of youth (15.9 percent in the City compared to 24.7 percent in the County).

Growth within the older age cohorts is consistent with national trends; however, this growth is less intense. For example, between 2010 and 2017, the City experienced a 37.2 percent increase in seniors, compared to over 200 percent in the county.

In addition, growth of the young adult cohort indicates the City has had success in appealing to young professionals and new families including providing housing at accessible price points, employment opportunities, and desirable character and amenities that appeal to these age groups. This trend provides a positive outlook for development in Downtown, particularly mixed-use and residential options that typically appeal to both seniors and young adults.



Source: U.S. Census Bureau



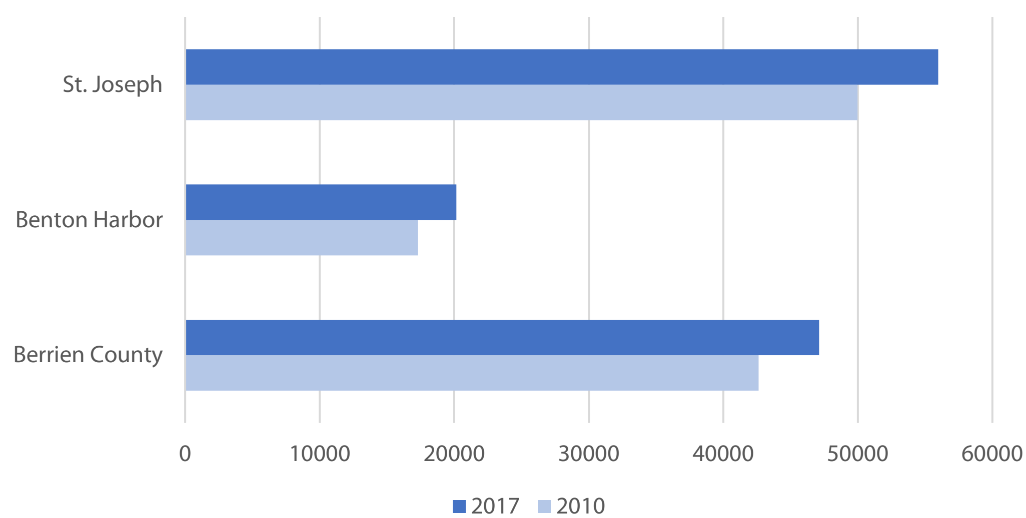
Source: U.S. Census Bureau

Income

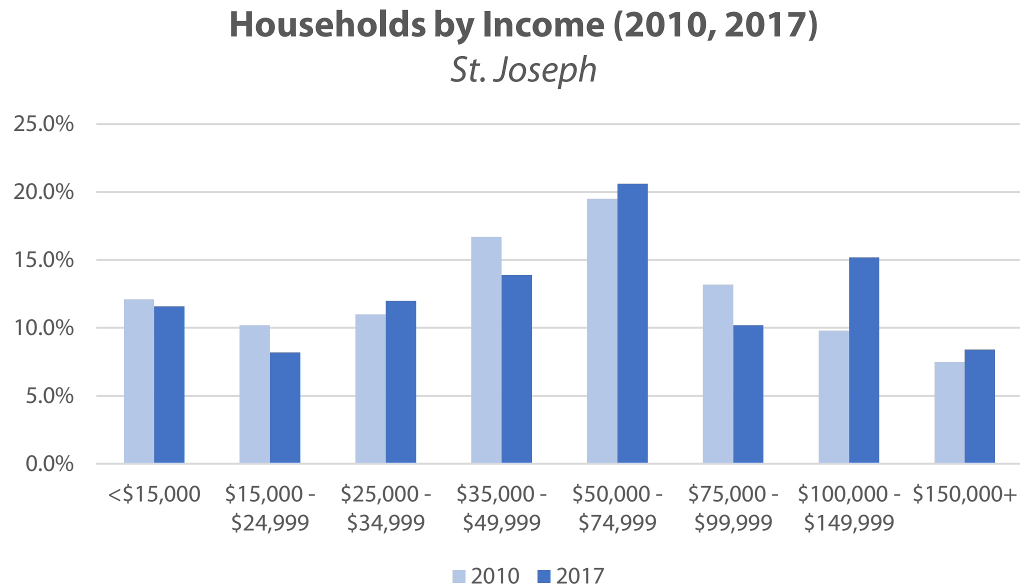
Incomes in St. Joseph are growing at a healthy rate. Between 2010 and 2017, the median income increased from $49,982 annual to $55,975. In 2017, St. Joseph's median income was greater than those of both Benton Harbor and Berrien County. In 2017, households earning between $50,000 and $75,000 represent 20.6 percent of the community, followed by 15.2 percent earning between $100,000 and $150,000. No other income range represents more than 14 percent, with the smallest being households earning over $150,000. This indicates a relatively even distribution of incomes for St. Joseph residents.

It should be noted that the calculation of median household income for St. Joseph, as well as Benton Harbor and Berrien County, does not account for households of part-time and seasonal residents in the area.

Median Household Income (2010, 2017)
St. Joseph, Benton Harbor, Berrien County



Source: U.S. Census Bureau

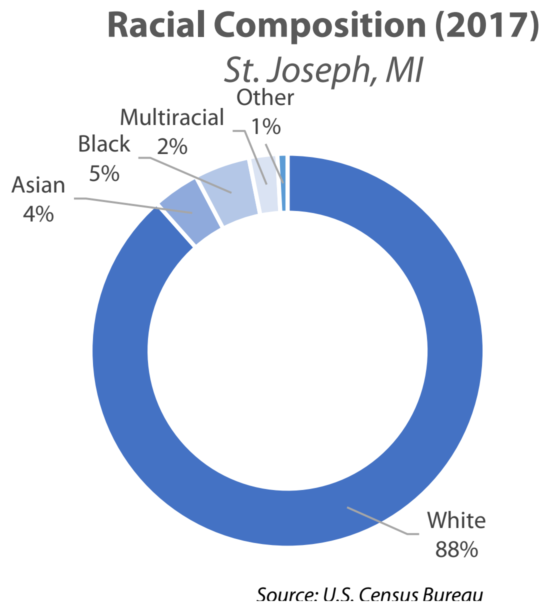


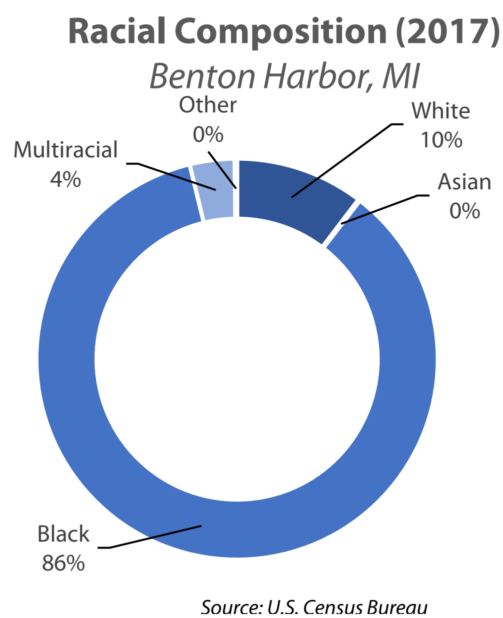
Source: U.S. Census Bureau

Race & Ethnicity

88.4 percent of the St. Joseph community identifies as White Alone. No other group represents more than 5 percent of the population. By comparison, both Benton Harbor and Berrien County are more diverse. Benton Harbor is 85.7 percent black, followed by 10.3 percent white, while Berrien County is 78.4 percent white, followed by 14.7 percent black.

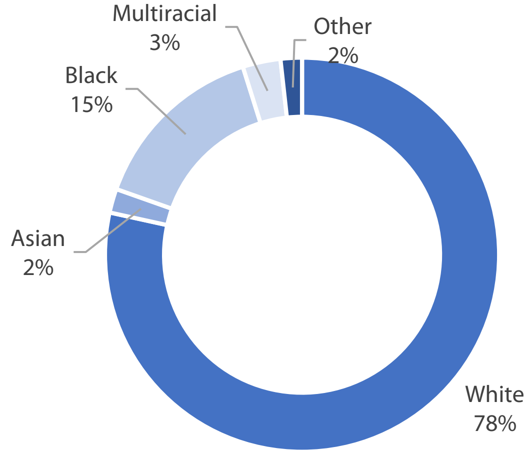
Similarly, 2 percent of St. Joseph residents identify as Hispanic, compared to 4.2 percent for Benton Harbor and 5.2 percent for Berrien County. It should be noted that Hispanic is classified by the U.S. Census as an ethnicity and not a race; thus, an individual who identifies as Hispanic will also identify with a discrete race.


Racial Composition (2017)
St. Joseph, MI
Other 1%
Multiracial 2%
Black 5%
Asian 4%
White 88%
Source: U.S. Census Bureau


Racial Composition (2017)
Benton Harbor, MI
Other 0%
White 10%
Multiracial 4%
Asian 0%
Black 86%
Source: U.S. Census Bureau

Racial Composition (2017)

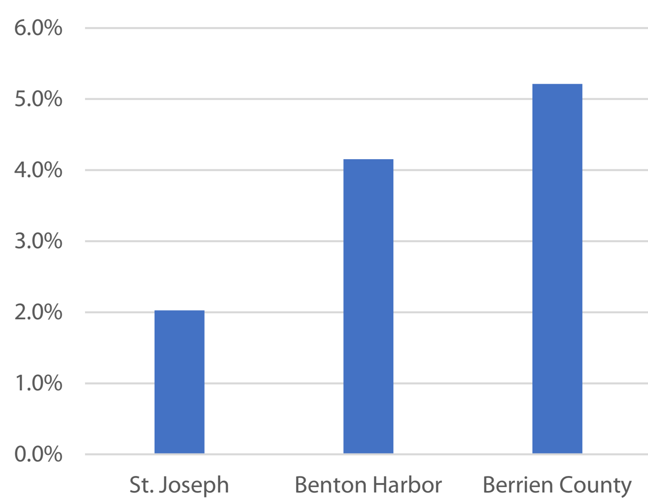
Berrien County, MI



Source: U.S. Census Bureau

Hispanic Population (2017)

St. Joseph, Benton Harbor, Berrien County

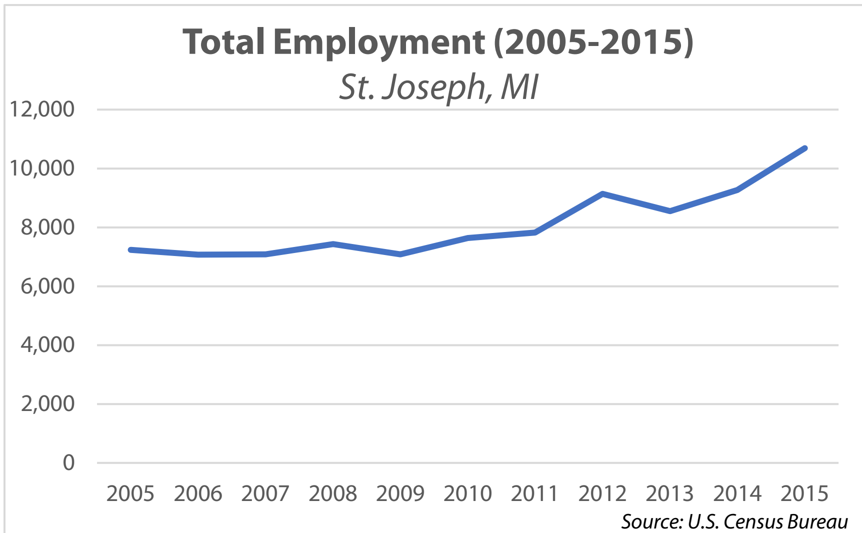


Source: U.S. Census Bureau

Labor & Employment

Total Employment

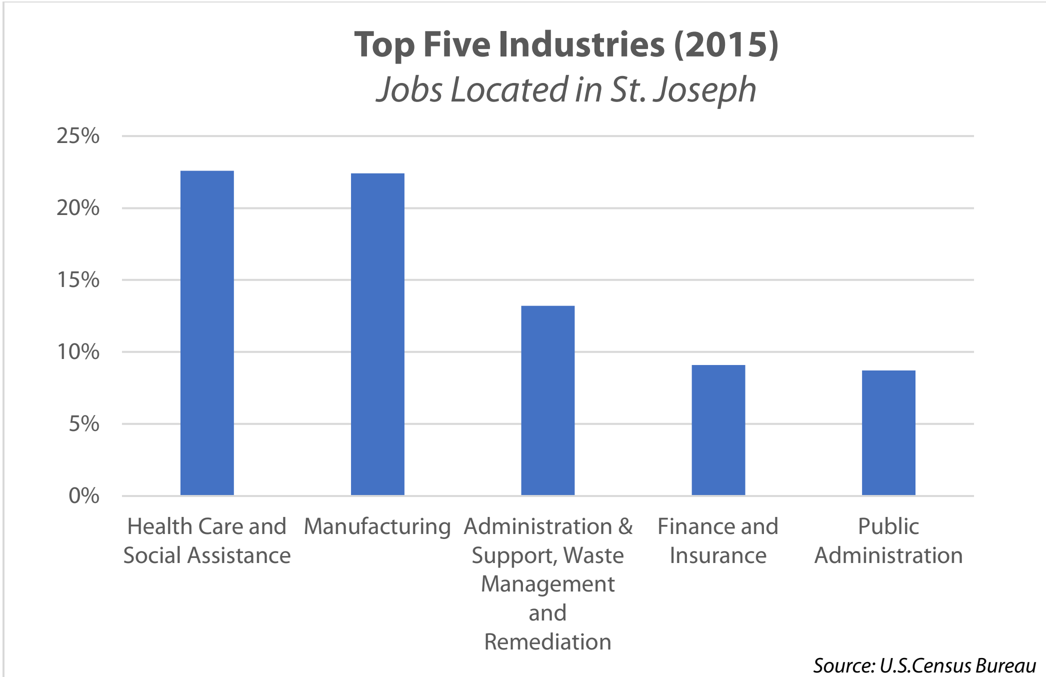
St. Joseph has experienced regular positive growth in total employment having added nearly 3,500 jobs between 2005 and 2015. Particularly of note, year-over-year employment grew by 17 percent in 2012 and 15 percent in 2015. This indicates a healthy if inconsistent employment market that is experiencing overall positive growth. Smaller fluctuations in total employment could be attributed to changes in how different industries are categorized or report their employees.



Industries and Employers

The Healthcare and Social Assistance industry and the Manufacturing industry are the two largest industries in St. Joseph, together accounting for 45 percent of all employment in the community. In total, the top five industries in St. Joseph represent 76 percent of all jobs in the City.

Some industries related to tourism saw considerable job growth between 2005 and 2015, such as Food and Accommodations which grew by 82 percent (342 jobs) as well as Arts, Entertainment, and Recreation which grew by 90 percent (53 jobs). It should be noted; however, that the largest job growth was experienced in the industries of Manufacturing (366 percent growth); Finance and Insurance (118 percent growth); and Administration & Support, Waste Management and Remediation (137 percent growth). Thus, while tourism remains an essential and growing part of St. Joseph, the City is not reliant on these industries and offers residents stable and non-seasonal employment.



Whirlpool Corporation is the largest employer in Berrien County, with over 4,000 employees, followed by Lakeland Regional Health System, with roughly 3,800 employees. The largest employer in Downtown St. Joseph is Berrien County Government, including the county courthouse and sheriff's department within the primary study area and the county administrative building to the south. In addition, Whirlpool's Riverview Campus is located proximate to Downtown in Benton Harbor.

Top Employers in Berrien County

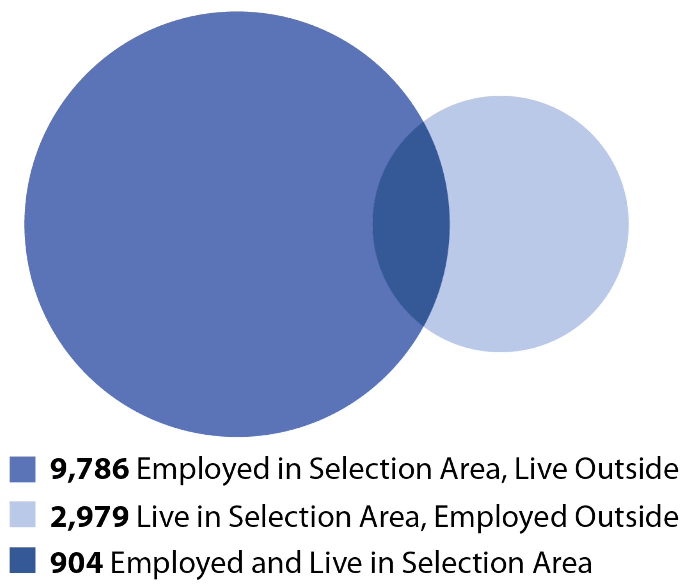
Company	# of Employees
Whirlpool Corporation	4000
Lakeland Regional Health System	3826
Andrew's University	2104
Four Winds Casino	1800
Indiana Michigan power / Cook Nuclear Plant	1200
Leco Corporation	650
Berrien County Government	635
Modineer Company	472
Benton Harbor Area Schools	455
Chassix Inc.	375

Berrian County (5/8/17) [*www.berriencounty.org/321/Industries-Businesses*](http://www.berriencounty.org/321/Industries-Businesses)

Inflow & Outflow

Inflow and outflow describes the movement of employees into and out of St. Joseph each day based on their place of residence. In 2015, of the 13,669 total primary jobs in St. Joseph, 9,786 of those positions were filled by non-residents. Only 904 St. Joseph residents both live and work within the community, while 2,797 City residents leave the community each day for employment in other communities. This indicates that over 12,500 individuals are leaving or entering the community each day when commuting to work. While this has implications for transportation during peak commute hours, St. Joseph's significant employment draw also highlights potential to capture retail demand from commuters and provide housing opportunities that increase the proportion of residents living and working in the community.

Inflow/Outflow Job Counts
(2015)



Housing

Total Housing Units

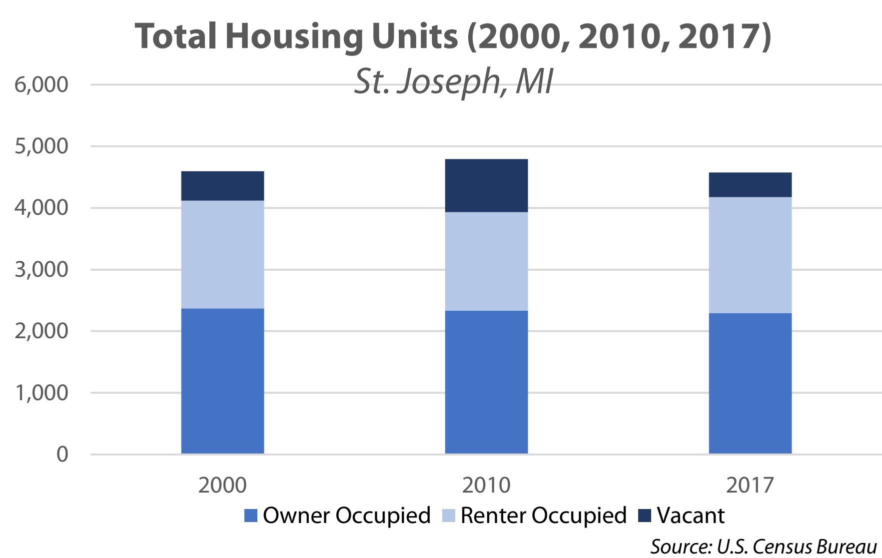
St. Joseph's total housing stock is generally stable, comprising 4,575 units in 2017. Between 2010 and 2017, total housing decreased by 200 units or about 4.6 percent. This could be the result of housing construction related to seasonal tourism as well as the removal of aging homes. Overall, between 2000 and 2017, a difference of only 0.4 percent occurred in total housing.

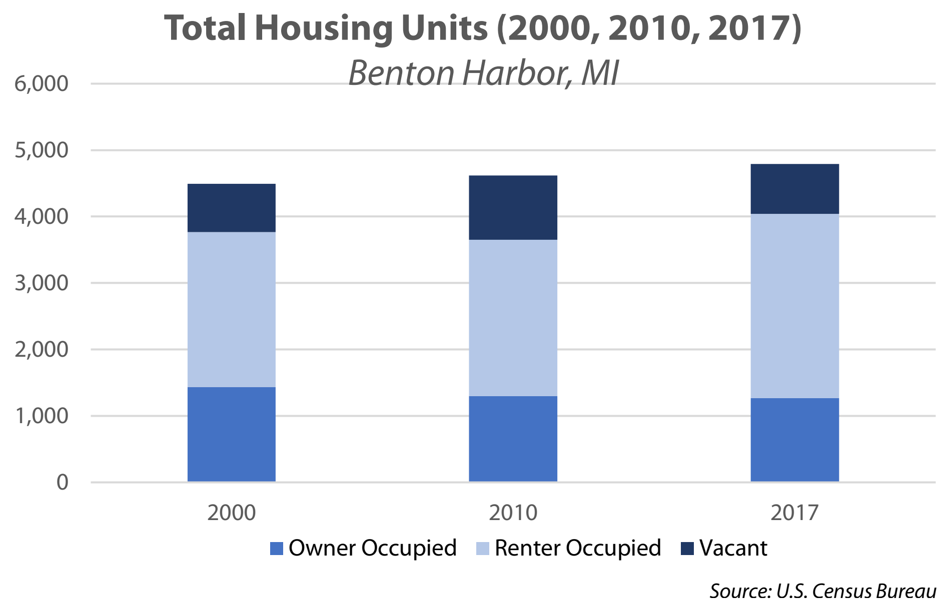
Housing Tenure

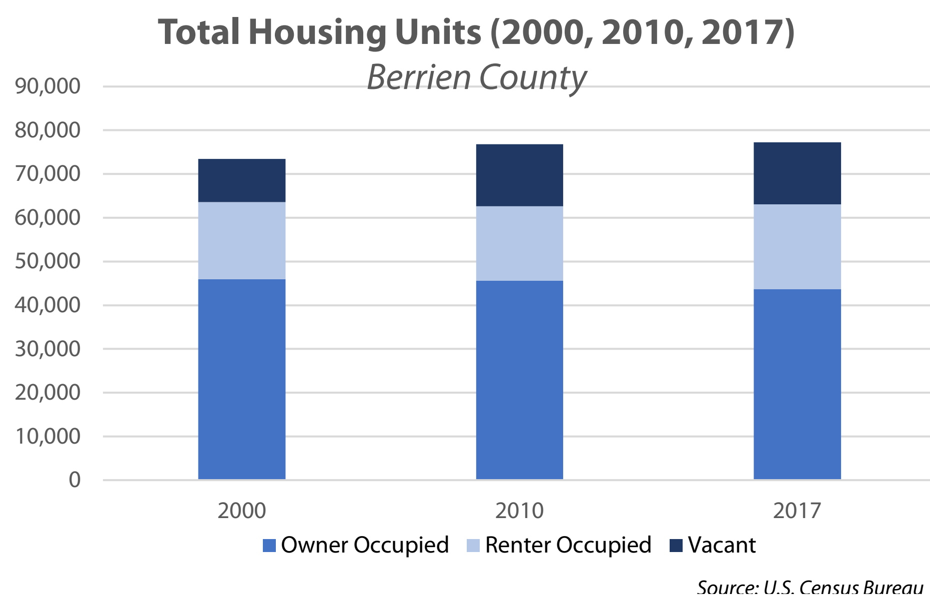
In 2017, housing in St. Joseph was 50.1 percent owner occupied (2,293 units) and 41.2 percent renter occupied (1,883 units). An additional 8.7 percent, just under 400 units, were vacant. This was a significant decrease of almost 10 percent from 2010, when vacancy was at 18 percent. By comparison, nearly 58 percent of housing units are renter-occupied in Benton Harbor and 25 percent of units are renter-occupied in Berrien County.

Together, St. Joseph and Benton Harbor represent a significant portion of renter-occupied housing within Berrien County. These two communities account for 13 percent of all occupied housing within the County, but contain 24 percent of all renter-occupied housing. For the City of St. Joseph, the high amount of renter-occupied units is consistent with seasonal tourism in the community. In Benton Harbor, the high amount of renter-occupied units may be more closely tied to household income and the affordability of homeownership for current residents. While having a larger proportion of rental units is beneficial to maintaining a diverse housing market, it places greater emphasis on owner accountability for maintenance and upkeep.

It should be noted that the availability of renter-occupied units may be overstated in St. Joseph due to seasonal tourism. While the City has a high volume of rental units, many may be partially or seasonally occupied, thus reducing the actual amount of rental units available for full-time residents.





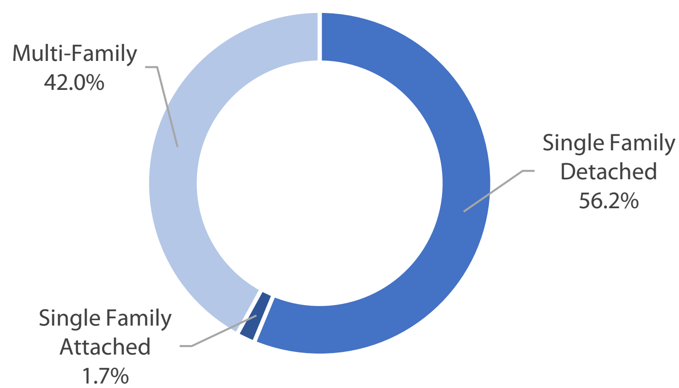


Housing Type

Housing in St. Joseph is 56.2 percent single family detached, 1.7 percent single family attached, and 42 percent multi-family. While single-family detached represents the majority of St. Joseph's housing, it is lower than both Benton Harbor (68.1 percent single-family detached) and Berrien County (76.4 percent single-family detached). Similarly, multi-family in St. Joseph (42 percent) is higher than in Benton Harbor (30.6 percent) and Berrien County (21.3 percent). These variations in the balancing of housing type in St. Joseph are likely related to seasonal tourism, particularly the high volume of multi-family housing. Also, it is noted that several multi-family and single-family attached units have been developed in the last few years and are not reflected in housing type numbers in this paragraph.

Housing by Type (2017)

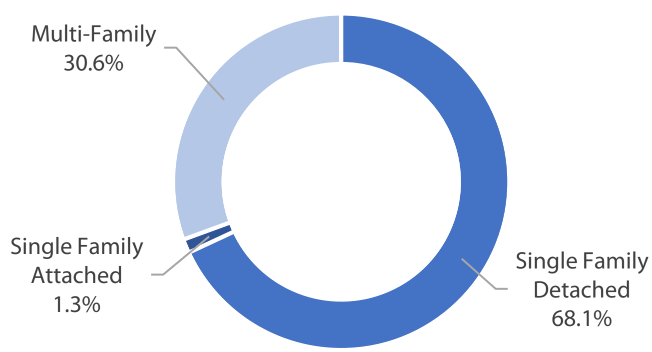
St. Joseph, MI



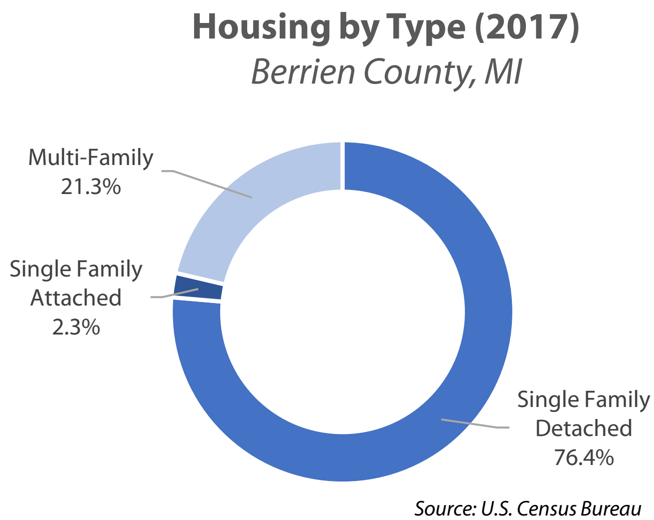
Source: U.S. Census Bureau

Housing by Type (2017)

Benton Harbor, MI



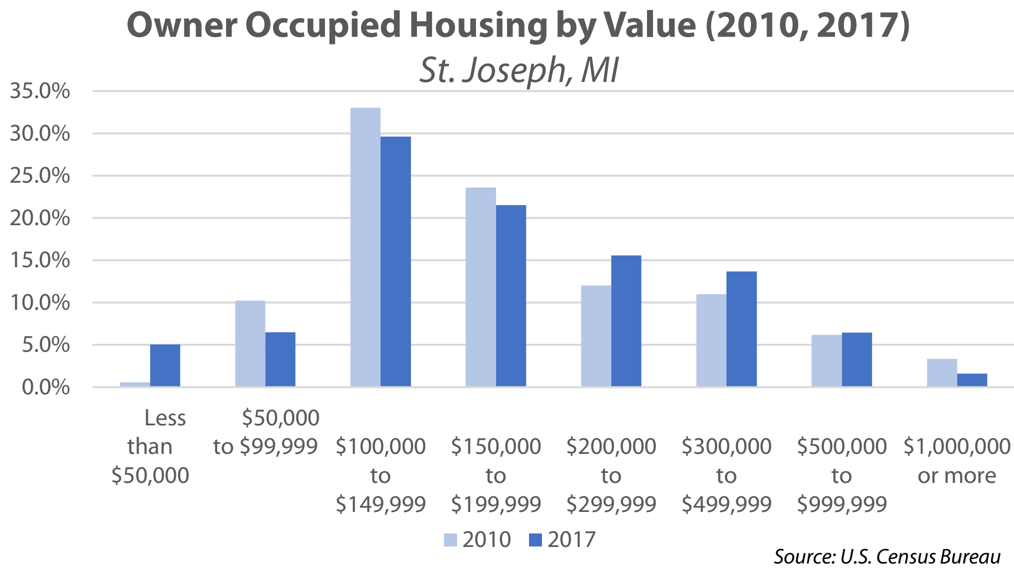
Source: U.S. Census Bureau

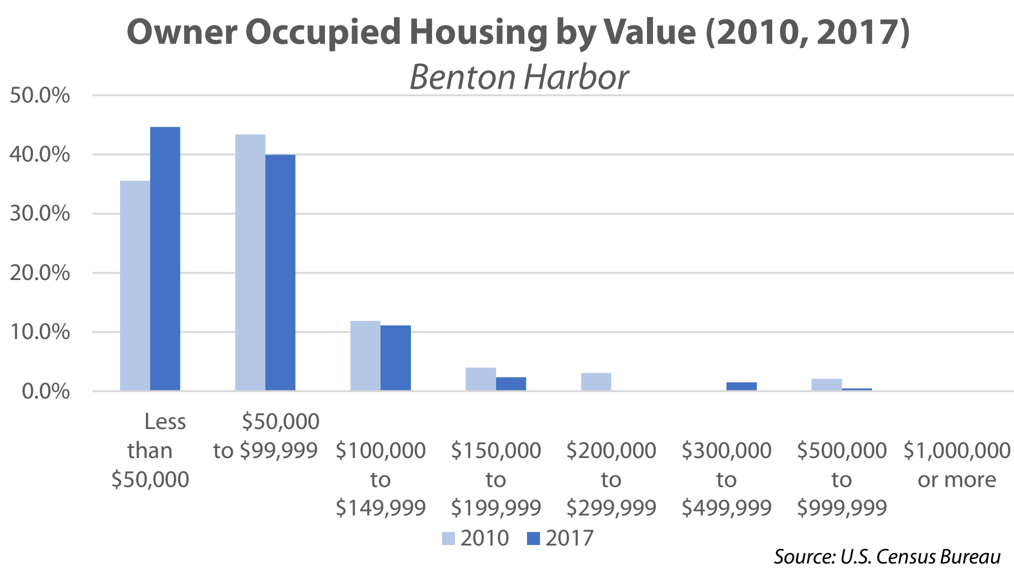


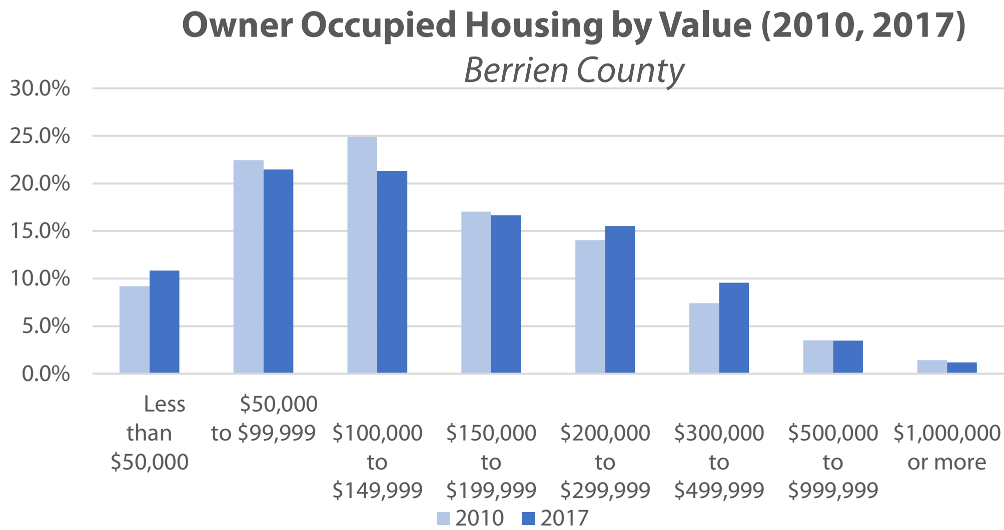
House Value

In 2017, the majority of homes were valued between $100,000 and $199,999, comprising 51.1 percent of all housing in St. Joseph. However, the amount of homes in this range decreased between 2010 and 2017, while homes valued between $200,000 and $1 million increased. The number of homes valued less than $50,000 also grew by 101 units between 2010 and 2017. While the margin of error within the data provided by the US Census could explain much of this increase, it may also be the result of older homes decreasing in value. Overall, the median home value increased from $160,600 in 2010 to $166,300 in 2017.

By comparison, homes values in Benton Harbor are far lower than those in St. Joseph, with a median home value of $56,200. Homes less than $100,000 in value account for 84.6 percent of housing in Benton Harbor. The distribution of home values for the county as a whole are similar to those in St. Joseph, with the exception of homes below $100,000. While these homes represent 11.6 percent of units in St. Joseph, they represent 32.3 percent of units in Berrien County.


Owner Occupied Housing by Value (2010, 2017)
St. Joseph, MI
35.0%
30.0%
25.0%
20.0%
15.0%
10.0%
5.0%
0.0%
Less than $50,000
$50,000 to $99,999
$100,000 to $149,999
$150,000 to $199,999
$200,000 to $299,999
$300,000 to $499,999
$500,000 to $999,999
$1,000,000 or more
2010
2017
Source: U.S. Census Bureau


Owner Occupied Housing by Value (2010, 2017)
Benton Harbor
50.0%
40.0%
30.0%
20.0%
10.0%
0.0%
Less than $50,000
$50,000 to $99,999
$100,000 to $149,999
$150,000 to $199,999
$200,000 to $299,999
$300,000 to $499,999
$500,000 to $999,999
$1,000,000 or more
2010
2017
Source: U.S. Census Bureau

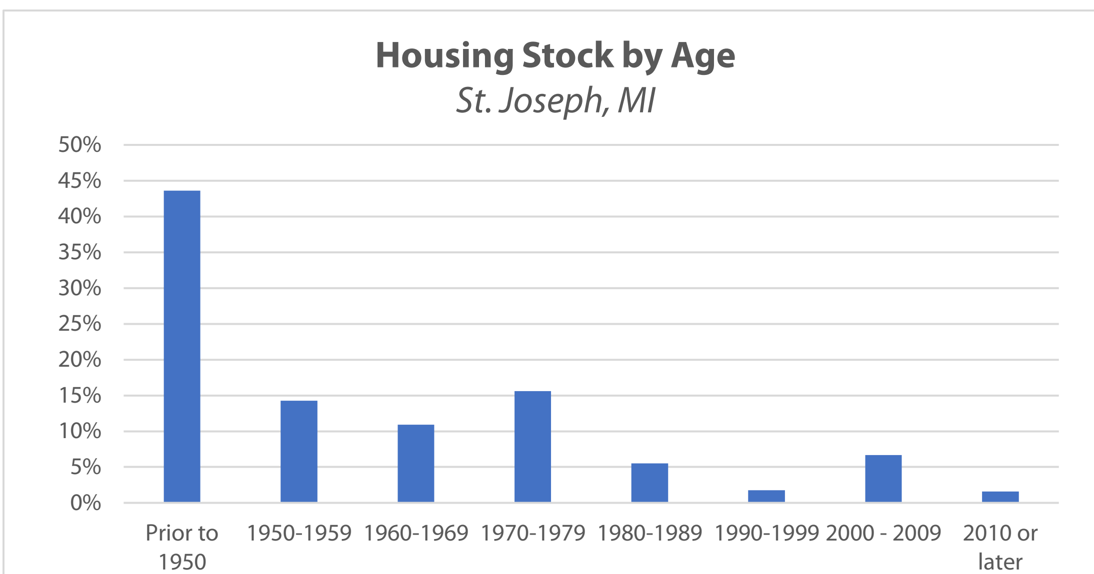


Source: U.S. Census Bureau

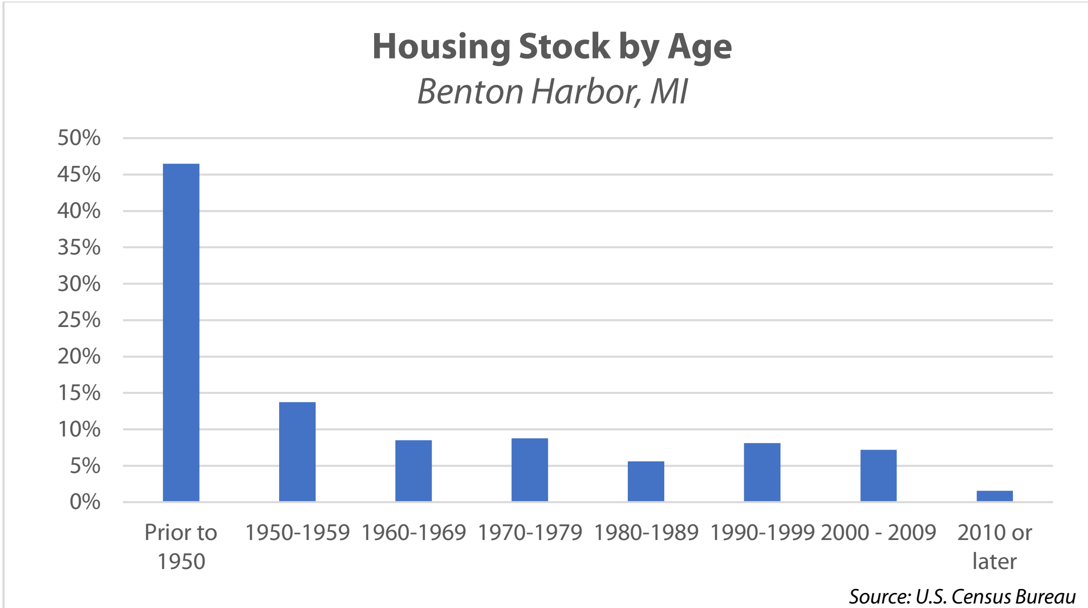
Housing Age

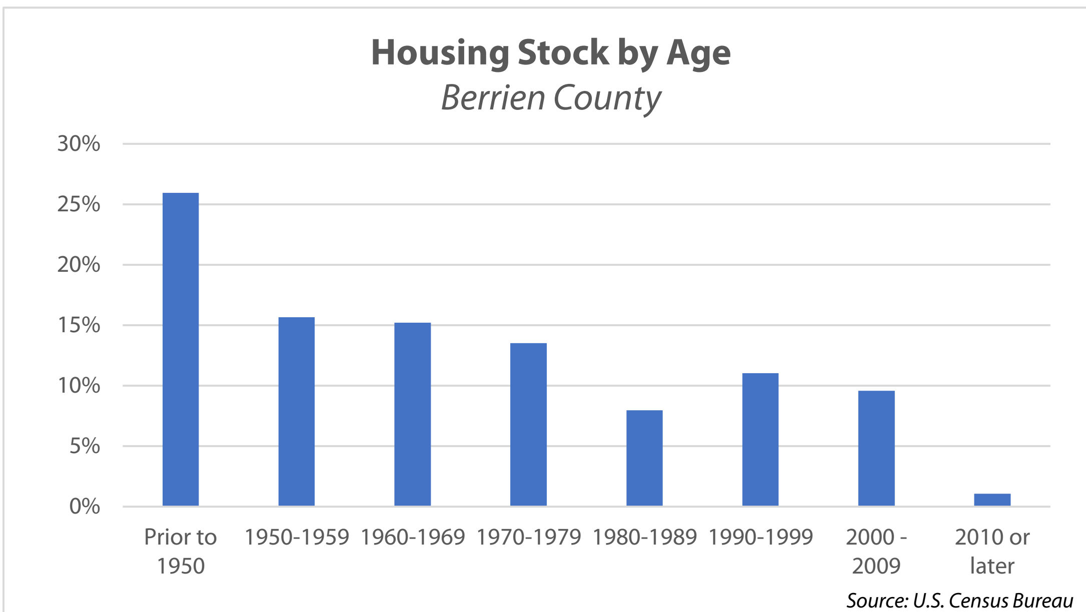
The majority of homes in St. Joseph were built prior to 1950, representing 44 percent of all housing. While another 41 percent were built between 1950 and 1979, only 16 percent were built after 1980 and just two percent were built since 2010. As the historic core of the community, Downtown St. Joseph is surrounded by many of the oldest homes in the City.

Housing age in Benton Harbor shows a similar trend, with 47 percent of housing built before 1950 and two percent building since 2010. Homes built before 1950 also represent just over a quarter of housing in Berrien County as a whole, but the County has a more even distribution. This includes 44 percent of homes built between 1950 and 1979 and 21 percent of homes built between 1990 and 2009. This is most likely the result of residential growth in the townships of Berrien County.



Source: U.S. Census Bureau

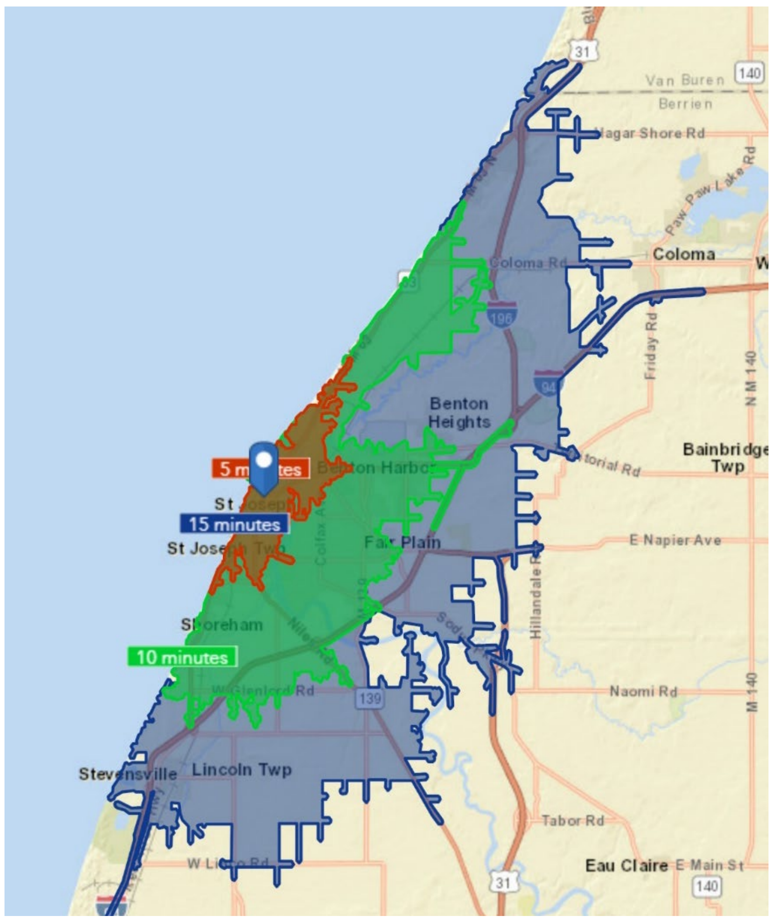

Housing Stock by Age
Benton Harbor, MI
50%
45%
40%
35%
30%
25%
20%
15%
10%
5%
0%
Prior to 1950
1950-1959
1960-1969
1970-1979
1980-1989
1990-1999
2000 - 2009
2010 or later
Source: U.S. Census Bureau


Housing Stock by Age
Berrien County
30%
25%
20%
15%
10%
5%
0%
Prior to 1950
1950-1959
1960-1969
1970-1979
1980-1989
1990-1999
2000 - 2009
2010 or later
Source: U.S. Census Bureau

Retail Gap Analysis

A “gap analysis” was conducted for the retail market of Downtown comparing retail supply and demand within both a local and regional context. A gap analysis compares aggregate consumer spending (demand) to aggregate retail sales (supply) within a given retail category and drive time. The gap analysis for Downtown St. Joseph uses 5-, 10-, and 15-minute drive times. The 5- and 10-minute drive times emphasize local markets, offering everyday goods and services. The 15-minute drive time represents a more regional market in which individuals will travel further for specific purchases and larger-ticket items. The 15-minute drive time extends from Downtown to Interstate 94 and includes competing regional retail destinations such as the M39 corridor and Fairplane Plaza.

Drive Times Map



The findings of the gap analysis help establish what types of new retail may or may not be supported. When consumers spend more than existing businesses can accommodate (demand > supply), this means that consumers are spending dollars outside of the market area. This is referred to as “leakage”. Typically, market areas with leakage represent potential opportunities for growth, as local demand for these goods and services already exists but is unmet by existing supply. Leakage is noted in the Retail Gap Summary table as a positive number in green. Conversely, when there is a larger amount of supply within a particular retail category or more than consumers spend (supply > demand), there is market saturation. This is referred to as a “surplus”. Surplus is noted in the Retail Gap Summary table as a negative number in red.

Retail Gap Analysis Summary (2018)
Downtown St. Joseph (Main Street & Broad Street)

Summary Demographics	5 Minute Drivetime		10 Minute Drivetime		15 Minute Drivetime	
Population	9,306		40,715		63,000	
Households	4,384		16,759		25,371	
Median Disposable Income	$38,502		$35,867		$39,486	
Per Capita Income	$33,764		$26,827		$29,293	
Overview	**10 Minute Drivetime**		**20 Minute Drivetime**		**30 Minute Drivetime**	
Total Retail Gap	$19.4		-$63.0		-$181.9	
Total Retail Trade	$32.8		-$40.8		-$156.8	
Total Food & Drink	-$13.5		-$22.2		-$25.1	
Retail Gap by Industry Group	**Retail Gap ($M)**	**Potential (Sq. Ft.)***	**Retail Gap ($M)**	**Potential (Sq. Ft.)***	**Retail Gap ($M)**	**Potential (Sq. Ft.)***
Motor Vehicle & Parts Dealers	$2.0	--	$10.0	--	$38.8	--
Furniture & Home Furnishings Stores	$3.0	7,486	$0.7	1,660	-$3.2	-7,964
Electronics & Appliance Stores	$1.4	3,407	$8.2	20,485	$13.5	33,684
Bldg Materials, Garden Equip. & Supply Stores	$3.4	8,383	$0.9	2,138	-$5.7	-14,320
Food & Beverage Stores	$12.0	30,036	-$32.1	-80,274	-$107.3	-268,254
Gasoline Stations	-$2.6	--	-$25.8	--	-$60.1	--
Clothing & Clothing Accessories Stores	$3.0	7,540	$13.3	33,144	$22.1	55,247
Sporting Goods, Hobby, Book, & Music Stores	-$1.1	-2,678	$0.5	1,345	$0.9	2,346
General Merchandise Stores	$14.6	36,625	-$20.4	-51,079	-$64.9	-162,213
Miscellaneous Store Retailers	-$3.7	-9,153	-$2.5	-6,337	-$2.7	-6,867
Nonstore Retailers	$0.7	--	$5.6	--	$10.1	--
Food Services & Drinking Places	-$13.5	-33,694	-$22.2	-55,538	-$25.1	-62,851

**Potential is based on an average sales of $400/sq. ft. Motor Vehicles & Parts Dealers, Gas Stations, and Nonstore Retailers are not included in this calculation.*
Source: ESRI Business Analyst; Houseal Lavigne Associates

NOTE: For the purpose of this report, the Health & Personal Care Stores industry group has been removed from the retail gap analysis. Data indicated that this group was oversupplied by $239 million dollars within the 5-minute drive time, including an excess of nearly 600,000 square feet. This is inconsistent with existing businesses within Downtown St. Joseph and was removed from the analysis to provide a more realistic understanding of the retail gap for the study area.

The St. Joseph market is undersupplied by $19.4 million in the 5-minute drive time, indicating leakage where existing businesses do not meet retail demand. However, both the 10- and 15-minute drive times are saturated, indicating general oversupply. Food and drink businesses are saturated within all drive times, including $13.5 million oversupplied in the 5-minute drive time.

Numerous industry groups demonstrate leakage within the local 5-minute drive time of Downtown St. Joseph, including $14.6 million for general merchandise stores and $12 million for food and beverage stores. Also, a handful of industries are either under or over supplied by less than $4 million, indicating that existing stores are within the range of meeting demand for those goods and services. While the food services and drinking places industry group (which includes restaurants and bars) is indicated as oversupplied by $13.5 million, this is not uncommon for downtowns, particularly those with seasonal tourism. In addition, community outreach indicated a desire to see more and greater variety of restaurants Downtown.

It is important to emphasize that the retail gap analysis is not meant to be prescriptive, but rather is intended to indicate both the potential and competition that existing and prospective retail and service businesses may face. Also, as previously noted, Downtown St. Joseph functions in a capacity that extends beyond the immediate resident population which represents expanded potential.

Overall, Downtown St. Joseph demonstrates potential for future investment, as existing development does not meet overall demand for food and services within the area. In addition, leakage indicates potential for additional businesses particularly within the 5-minute drive time. As such, growth and continued vibrancy of the Downtown retail market will be reliant upon investment that serves to capture unmet demand generated by a combination of residents, daytime population and seasonal visitors.

That being noted, the retail gap analysis should not be seen as prescriptive, but rather describes the potential and competition that different retail and service businesses may face. For example, while food service and drinking places are oversupplied, community outreach indicated a desire to see more and different kinds of restaurants in Downtown. Also, as previously noted, Downtown St. Joseph functions in a capacity that extends beyond the immediate resident population which represents expanded potential to support additional square footage.

Memorandum

To:	**John Houseal, FAICP, Houseal Lavigne**
From:	**Kelly Conolly, P.E. & Jane Wilberding, AICP**
Date:	**May 17, 2019**
Re:	**St. Joseph Downtown Vision Parking Evaluation Progress Update**

Sam Schwartz is currently in the process of conducting a review of multimodal conditions and parking in the downtown area in conjunction with the Downtown Vision master planning process. We have focused our initial efforts on inventorying the existing parking assets and collecting parking utilization data to benchmark how much of that parking is being used during "off-season" conditions. The purpose of this memorandum is to summarize the parking data gathered so far and outline additional data needs and further transportation analysis that will be conducted over the course of the peak summer season months. The memo concludes with general information on parking management best practices, which will ultimately be used to inform the development of recommendations.

What makes up the Downtown parking system?

St. Joseph's parking system accommodates a variety of users through a combination of on-street and off-street parking throughout the downtown area. The Downtown Vision study area includes four separate zones. However, the majority of the public parking facilities, and demand, is concentrated in Zones 1 and 2, which will be the primary evaluation of the report. Within these two zones, there are approximately 3,593 total spaces between on-street, publicly owned off-street, and privately-owned off-street parking facilities, broken down as shown in **Figure 1. Figure 2** maps the location and type of on-street parking and each off-street facility.

Figure 1 – Parking inventory allocation by type

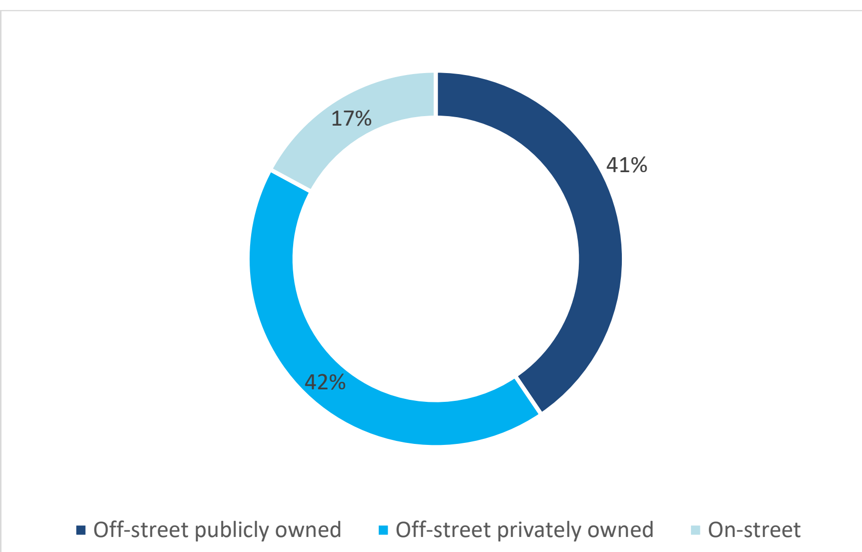
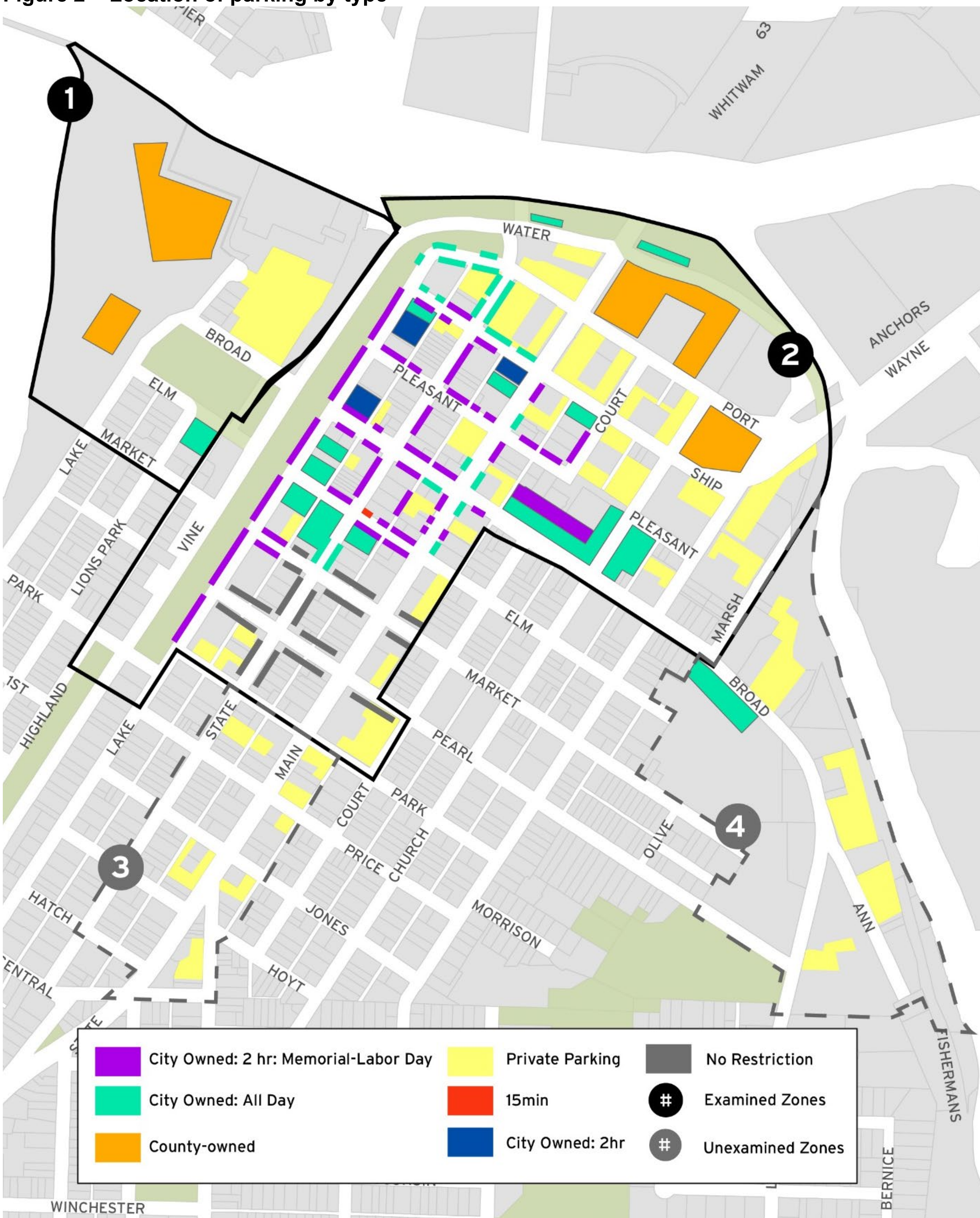


Figure 2 – Location of parking by type



On-street Parking

The pool of approximately 562 on-street spaces includes some of the most sought-after parking assets within the Downtown area. The vast majority of these spaces are designated with a 2-hour time limit Memorial Day through Labor Day. All Day, No Restriction, and 15-minute parking make up less than 30% of the total inventory. **Table 1** summarizes the on-street parking inventory and designations. All on-street spaces are free, year-round.

Table 1 – On-street parking by type

Type	No. of Spaces	% of Total
All Day	84	15%
2hr: Memorial-Labor Day	396	71%
No Restriction	80	14%
15min	2	0%
Total	562	100%

Off-street Parking

There are approximately 34 off-street parking lots within Zone 1 and 2, including public and privately-owned facilities with a variety of regulations intended to accommodate the type of user and duration of their stay. The breakdown of off-street parking can be seen in **Table 2**.

Table 2 – Off-street parking by type

Type	Inventory	%
City Owned: All Day	520	17%
City Owned: 2hr-Memorial-Labor Day	68	2%
City Owned: 2hr	108	4%
County owned	944	31%
Private	1391	46%
Total	3,031	

Making up approximately 46 percent of the total off-street parking supply, private parking makes up just under half of the off-street parking pool. County owned facilities make up 31 percent of the total, with the County lot being free to the public after 5pm and the parking lots on the beach being pay to park. Daily parking rates on these lots are $7 for residents and $12 for nonresidents, while the monthly rate is $40 for both resident and nonresident parkers. Other than these lots at the beach, all off-street parking is free.

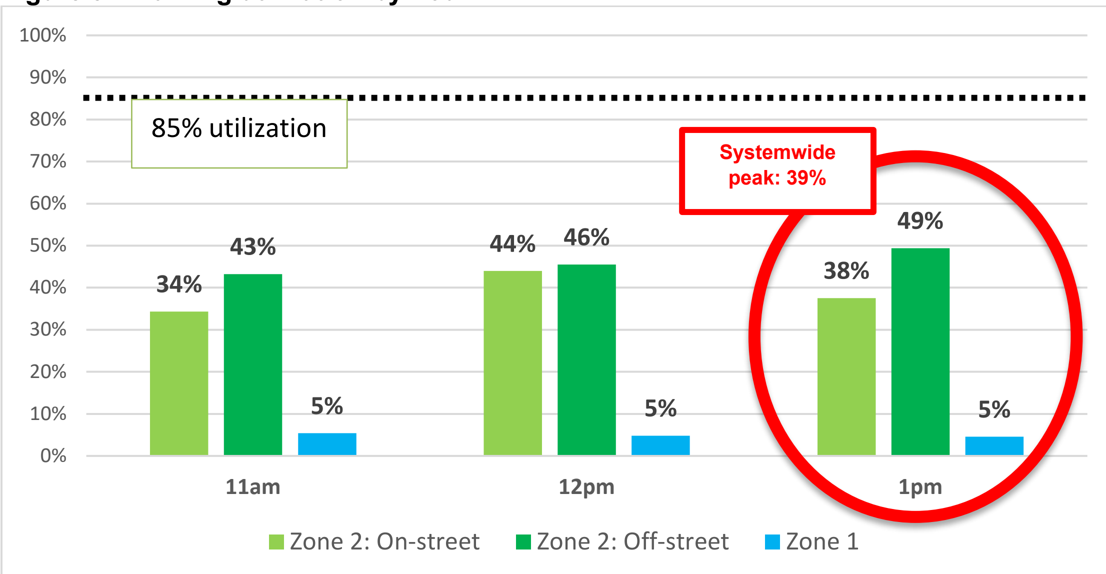
When and where is parking used?

Parking demand was analyzed through a system-wide utilization survey to determine the peak "systemwide" period of demand within Zones 1 and 2 during the Downtown's off-season. "Systemwide" peak refers to the period in which the highest number of spaces were filled in the Downtown's on- and off-street parking facilities. Additional surveys will be conducted during the peak summer season.

Off-season Parking Demand

Parking surveys were completed Data was collected on Tuesday, March 26, 2019 between the hours of 11:00 am and 1:00 pm to determine the off-season peak period of demand within Zones 1 and 2. A summary of the survey results can be seen in **Figure 3**.

Figure 3 – Parking utilization by hour

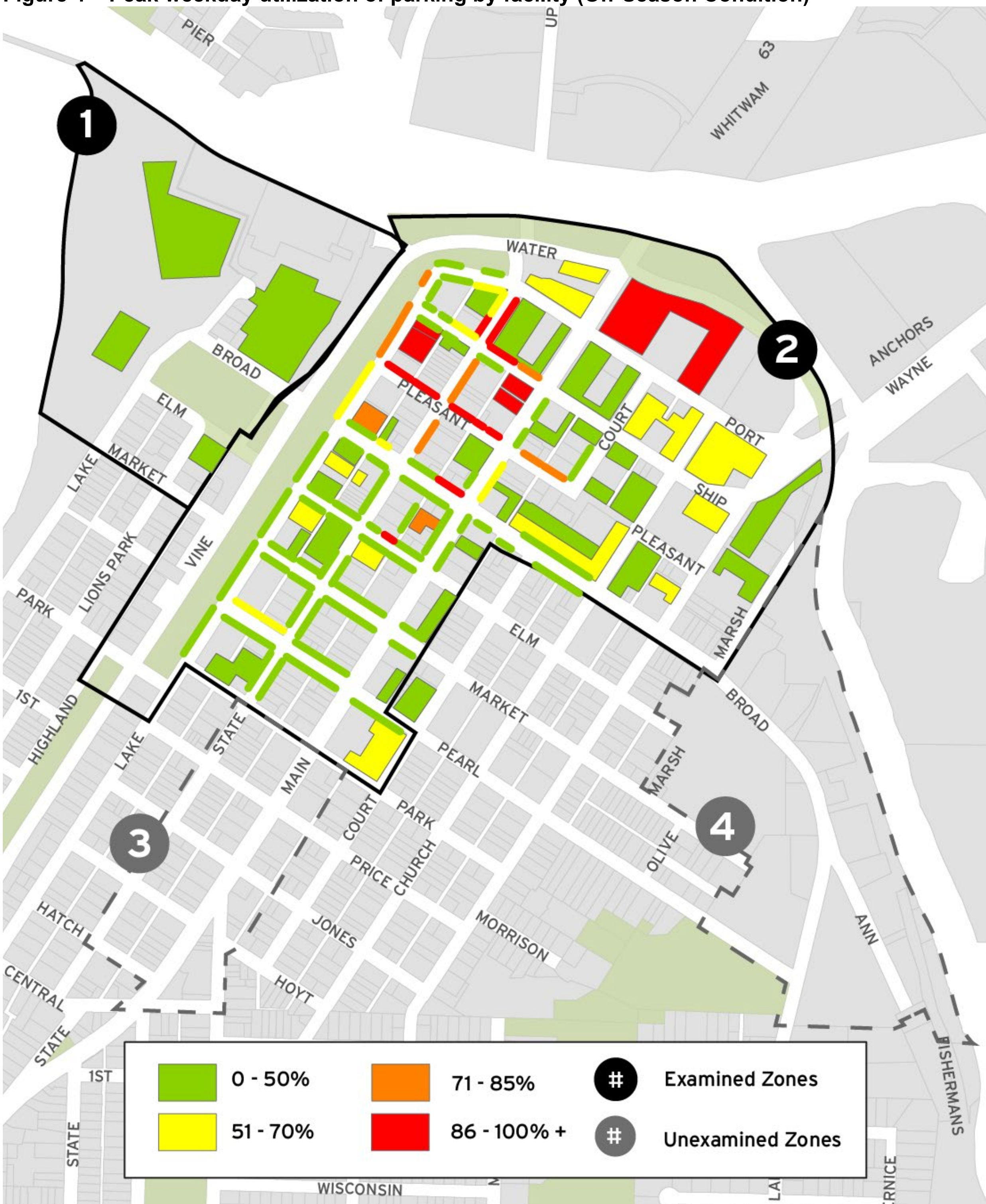


Overall, the utilization of off-street parking was higher than that of on-street parking during each of the surveyed time periods. The peak period of demand overall occurred at 1:00 pm in which 39 percent of all parking assets were filled. This "system-wide peak" will be the focus of the subsequent analysis. Utilization of 39 percent is well below the system's functional capacity and is considered underutilized. **Figure 4** shows utilization for the system-wide peak demand period during this off-season condition.

The effective and efficient turnover of convenient parking spaces is most successful when the facility reaches an 85 to 90 percent occupancy rate, meaning that 10 to 15 percent of spaces are available at any given time for incoming parkers. Accordingly, the remainder of the report will refer to a parking facility as exceeding its "functional capacity" or its "effective utilization rate" if the parking occupancy is greater than 85 percent. Generally, it is critical to ensure that centrally located parking facilities do not exceed an 85 percent functional capacity so that spaces are available for incoming customers and visitors. This translates to approximately one to two open spaces per block.

Although on- and off-street facilities were well below this threshold for each of the examined time periods, specific lots and street segments did exceed their functional capacity. The streets with the highest demand are State Street and Pleasant Street which are also associated with the highest concentration of active uses. Similarly, off-street facilities with the highest demand included publicly available surface lots on Ship Street between Main Street and Lake Boulevard, adjacent to a variety of retail and commercial amenities. The other off-street facility that displayed a utilization rate above 85% was the Berrien County Courthouse, which is likely associated with the high number of employees and visitors using the Court house at this time. This analysis demonstrates, however, that there are many facilities with an occupancy rate below 50 percent within Zone 2, meaning that there are opportunities for excess demand to be absorbed.

Figure 4 – Peak weekday utilization of parking by facility (Off-Season Condition)



What do people have to say about transportation and parking?

The primary parking and transportation opportunities and issues were discussed during a meeting with key staff stakeholders held Tuesday, March 26, 2019. The following City personnel attended the meeting:

- Kristen Gundersen, St. Joseph Community Development Director
- Amy Zapal, St. Joseph Today
- John Hodgson, City Manager
- Alex Austin, Assistant City Engineer
- Steve Neubecker, Interim Director of Public Safety
- Tom MacDonald, Director of Public Works and Interim Assistant City Manager
- Tim Zebe II, City Engineer

Key comments, issues and concerns are summarized below:

- Significant enforcement investments have been made in recent years. Transitioning to a License Plate Reader (LPR) system. These investments have allowed enforcement officers to monitor the demand patterns and duration of stay. Data can be shared.
- There is a great deal of congestion between the months of May and September, with the peak month identified as July.
- The highest parking demand tends to occur along State, Broad, and Pleasant Streets, in which there is the most traffic and circulation issues as well.
- City staff reported a continued increase in demand for parking in the summer months over the years, despite a plateau of development in the Downtown and surrounding area. Growth was attributed to more tourism and "the word getting out" about the quality beaches and amenities in St. Joseph.
- Signage is something that often comes up during internal staff meetings. The City would like to better understand how to best direct people to available/remote lots as a means of reducing congestion in the core area.
- There are many events in the downtown, particularly during the summer months.
- St. Joseph's downtown used to have parking meters, but they were removed in 1975 as a means of attracting more people downtown. Given the increased demand seen in more recent years, staff and merchants are interested to learn more about installing meters, providing discounts for residents, changing time limits so people can stay and shop, and preventing employees from parking in prime areas.
- City staff were interested in better understanding the appropriate time limits to set for their off-street facilities. Wondered if two hours was not long enough for shoppers, and if four hours was too long, allowing employees to park in these locations.
- City staff recognizing that their bike/ped amenities are currently lacking, and that there is an opportunity to improve the pedestrian experience, particularly crossing Main Street as a means of distributing parking demand.
- Intersection modifications are planned by MDOT at Main Street/Port Street which will improve overall circulation by allowing vehicles to turn right AND LEFT onto northbound Main Street from Port Street.
- Staff has seen an increase in recreational biking, biking to visit Downtown, and bike parking needs. There is not currently a comprehensive bike facilities plan for St. Joe.
- Traffic is congested during peak season as circulation occurs down the bluff to Silver Beach parking lots. Lake Street (Broad to Elm) becomes one-way southbound May through September.

Parking Management 101

Parking management is key to creating a livable community, with the goal of balancing supply and demand through pricing, time limits, and/or other regulations. Well-designed parking policies ensure the continued health and vibrancy of any downtown. When parking is the dominating land use, it separates and expands the area of each individual store or land use. This forces shoppers to park more than once when completing several tasks, creating a car-oriented landscape surrounded by surface lots as opposed to a walkable area that encourages cross-shopping and increases social interaction. Accordingly, best practices in parking management are inclusive of many mobility options necessary to serve the future of the community, as opposed to its primary land use.

Evolution of Parking Management

Typically, the amount of parking supplied influences its demand, making it impossible to determine the optimal supply without considering the long-term costs and benefits of increasing the number of spaces. Although municipalities approach these issues differently, trends have emerged in the progression of how to address parking demand issues. Most communities begin by providing free parking for residents, visitors, and employees. However, as more development occurs, more visitors come downtown, and main commercial corridors become congested and negatively impact the area's ability to attract shoppers or other pedestrians, local governments then tend to put parking regulations in place, including time restrictions, boundaries for specific users, and increased enforcement fees.

If the demand for available spaces continues to increase, as well as complaints and frustration of visitors, cities often construct additional parking in the form of surface lots or garages. Although increasing the supply of parking will reduce the number of complaints in the short-term, longer term issues occur as the demand for parking will inevitably increase. If this practice continues, the downtown will quickly be dominated with parking and the community will have spent a large portion of its revenue on increasing its parking supply as opposed to improving physical appearance or economic initiatives. Often there is actually enough supply throughout a city's downtown to accommodate the demand. However, it is in areas that are not directly in front of the driver's ultimate destination, perceived as dangerous, or in locations that are difficult to find. Parking management works to balance this demand and supply. Below are several best practice strategies to manage supply and "right-size" the parking system.

Encouraging a "Park Once" environment. One of the most valuable aspects of a downtown is that drivers are able to complete a variety of tasks within a single area. For example, a shopper might come to the St. Joseph's downtown go to meet a friend at Café Tosi, stop by the Toy Company to pick up a gift, then stop by Perennial Access before leaving. Downtown, a driver will be able to do all those things while only using one parking space, as opposed to getting back into their car and parking in a separate space or lot for each.

The "Park Once" strategy allows people to complete tasks quickly, conveniently and in a lively, safe environment, while encouraging walking and social interaction. The particular characteristics that enable people to do a lot of different things in a small area are distinctly what makes downtowns attractive places to live and visit: density, mix of uses, and walkability. Each of these characteristics are enhanced in a Park Once environment.

Introducing pricing policies to manage demand. In an effort to balance parking demand and encourage parkers to use the system in its entirety, parking management strategies can be used to shift the demand to some of the downtown's more underutilized areas. Parking pricing policies align supply with demand, typically increasing the rate of parking in high demand areas and decreasing the rate of parking in low demand areas. This is intended to encourage those who are parking long-term to locate in areas with lower demand while ensuring that spaces are available for incoming shoppers.

Reinvest parking funds to the community. One of the main reasons people are opposed to paying for parking is because the revenue typically doesn't fund any immediately tangible benefits. Reserving a portion of the generated revenue and putting it directly back into the community to increase safety efforts, promote alternative transportation modes, or enhance physical improvements ties the payment to a benefit, and makes parkers more likely to support the changes.

What motivates parkers?

Prior to contemplating parking modifications, it is important to identify who currently parks where and what motivates them. Gaining an understanding of existing parking behavior within a downtown allows for more effectively shaped policies that will alter behavior. Although each person acts in their individual self-interest when parking, generally—and is likely the case in St. Joe—the majority of parkers can be identified as one of three types, based on their behavior: *Convenience Parkers, Reasonable Parkers, and Bargain Parkers.* The defining characteristics of each are presented below:

Convenience Parkers: Convenience parkers are generally new or occasional visitors traveling to downtown for a relatively short period of time to shop, eat, or run errands. They are typically unfamiliar and sometimes even uncomfortable with the higher concentration of activities within a downtown and would like their parking experience to be as seamless as possible. They prioritize convenience and are willing to pay or park in a timed area for a space in close proximity to their destination. This user group is also the most likely to give up and drive to an alternative location to shop, eat, or run errands if they are unable to locate a space.

Reasonable Parkers: Reasonable Parkers are frequent visitors, nearby residents, or customers who are typically familiar with the area, making medium length trips to meet a friend for coffee, shop for the day, or go out to dinner. They may also be part-time or full-time employees who are willing to pay a higher price to park closer to their job. Like all user groups, Reasonable Parkers prefer free parking but are willing to pay or walk, as long as it is within reason and they understand why their choice is logical.

Bargain Parkers: Bargain Parkers are residents, employees, or long-term shoppers frequently making a longer trip to get downtown. As the name implies, bargain parkers avoid paying for parking at any cost. They are the most willing to circle the block to locate a space, walk a few blocks away, or alter their commute in order to save money. Some thrifty parkers may even decide to walk or bike instead of paying for parking or they may decide to shop somewhere else altogether if they can't find free parking.

Each type of parker has different priorities. These priorities can be managed by implementing parking management policies that distribute parkers throughout a downtown parking system. In a typical downtown, the most desirable parking spaces are on-street along commercial corridors in which the majority of businesses and retail activities take place, closely followed by on-street spaces along side streets. Surface lots are less desirable but are still easily accessible for patrons to enter and exit. Structured parking facilities or remote surface lots are typically the least popular due to the perceived hassle associated with getting in and out of them, although winter weather conditions can make garages more desirable than surface lots for some users.

What else are we going to study?

This memorandum serves as a summary of work done to-date. Progress is continuing on several other components, including:

- Parking enforcement procedures
- Budget and transportation/parking decision-making process
- Peak-season parking utilization data collection and circulation observations
- Zoning regulations and incentive programs
- Beach parking circulation
- Main Street and Port/Ship traffic demands
- Bike access/circulation/parking
- Pedestrian crossings